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MARKETING & MEDIA DECISIONS

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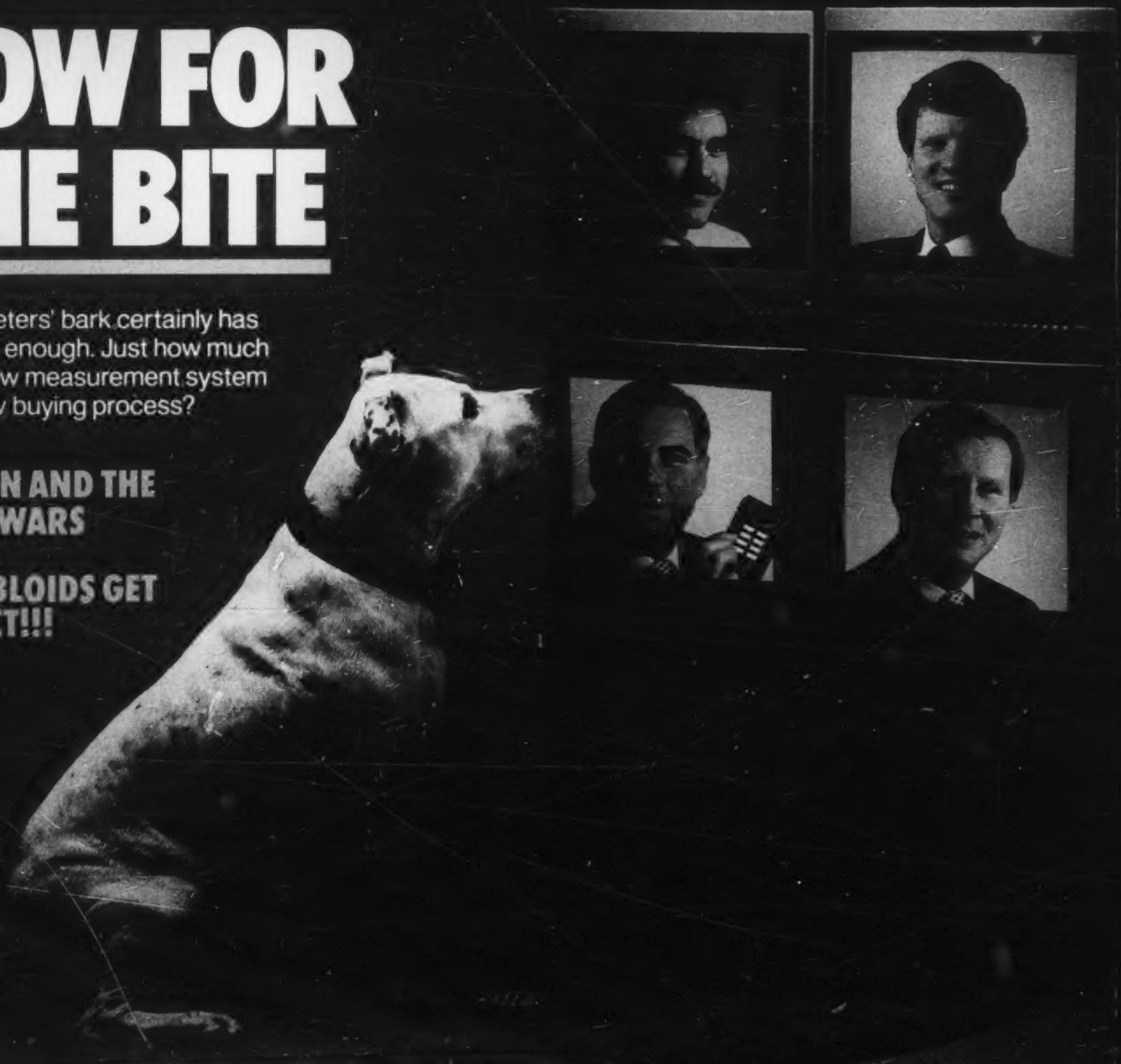
NOW FOR THE BITE

People meters' bark certainly has been loud enough. Just how much will the new measurement system alter the tv buying process?

CLARION AND THE COLOR WARS

THE TABLOIDS GET RESPECT!!!



Arbitron's Spaeth
AGB's Philport
R. D. Percy's Percy
Nielsen's Dimling

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GREG CHRIS
CONGRESSIONAL INF SVC
4520 EAST-WEST HWY #800 DIR
BETHSEDA MD 20814

MARKETING & MEDIA DECISIONS

COVER STORY

PEOPLE METERS: WILL THEIR BITE EQUAL THEIR BARK? 36

It's difficult not to get carried away when considering the people meter. Opinions regarding its potential impact on how tv is bought and sold, however, should be kept in check until all the facts are in. Herewith, the facts as they stand, and a look into the future.

BEING HERE NOW 45

As the debate goes on, agency media departments must decide *now* just how they're going to live with the new audience measures.

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Many media planners who find their desks cluttered with invitations to promotional parties think not. But publications insist the festivities work in fostering not only good will, but also the requisite space orders.

COLOR IT SUCCESSFUL 61

Clarion has put the blush back in the color cosmetic category with a mass-minded strategy — and a counter-top computer.

TABLOIDS GET RESPECT!!! 66

Where would these publications be without the exclamation mark? Apparently, still on many national advertisers' plan as a way to round out a print buy.

MILK: ALL SHOOK UP 74

This most basic of beverages is the starting point for a number of new products. Are you ready for a milk-based, carbonated, root-beer-flavored soft drink?

SPECIAL REPORT

THE YEAR IN B-to-B 83

It's no secret things are tight. As business-to-business budgets shrink, media options expand, causing planners to think even more carefully about how they place their clients' advertising dollars.

Decisions presents the big picture, and the big spenders. Included, for the first time, is an exclusive look at *Rome Report*'s ranking of the top 100 business-to-business advertisers in 1986 (page 89), plus breakdowns of the top ten ad categories (page 92). Within these categories, we've identified the top five advertisers and the top five business publications ranked by expenditures and revenues, respectively. Capping the charts are the top ten business-to-business publication categories by percentage gain. To round out these numbers, b-to-b on tv is examined (page 99), including a guide to what's on, when and, most importantly, for how much.

BRAND REPORT 142: WINE COOLERS 125

All the fizzy excitement in this market masks one fact: the players are spending a fortune to stay in the game.

DEPARTMENTS

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John Holt adds Nielsen to his purview at Dun & Bradstreet, and Hugh O'Brien rides into Knoxville after 15+ years on the agency/advertiser trail.

UPDATE 6

Sterling looks to put some polish on its ad campaign, Grey adds another plus to its software and Met Life gets a boost in the Hispanic community.

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Good Housekeeping's Victoria aims to fulfill the fantasies of today's overworked woman. From Murdoch, it's lights, action, *Premiere*!

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To boost Saturday home subscriptions, the *New York Times* is testing early delivery of some Sunday sections.

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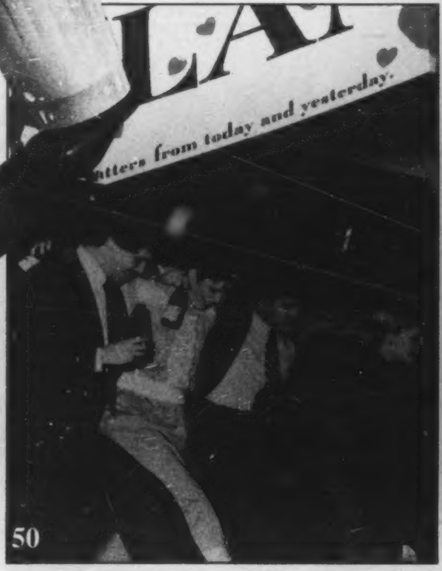
May 1987, Vol. 22, No. 5

Cover photograph by Steven Begleiter



50

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FREEZE FRAME 32

There's good news and bad news for the local operators regarding ESPN's NFL buy-in. At MTV, the age of the happening has returned as the cable net enters the event arena.

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What's does fall 1987 have to offer? Foote, Cone & Belding is the first agency to publiciy appraise the fall prime time possibilities.

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The FTC has no objection to doctors selling prescriptions directly to their patients. Of course, the pharmacists can think of a few.

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Peace reigns on at least one front in the ad/promotion battle: Promotion companies are a hot growth category in b-to-b advertising.

LAST WORD 160

One expert is beginning to believe the industry uses the wrong approach in measuring the effects of traditional media advertising.

AS THEY SEE IT

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Some guidelines for applying creative thought to the planning process.

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How can newspapers better market themselves? Start with rates, then move on to joint media promotions.

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Sizable economic clout does not necessarily translate into the best advertising rates.

YELLOW PAGES *William Frank* 116

All of the players — agencies, advertisers, publishers — have a lot to digest as yellow pages turn over a new leaf.

MAGAZINES *Gerald Eilers* 118

Negotiated rates can be as treacherous for a media buyer as for a publisher. For the buyer, what's in black and white turns to grey. For the seller, black can turn to red.

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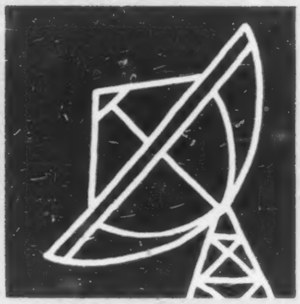
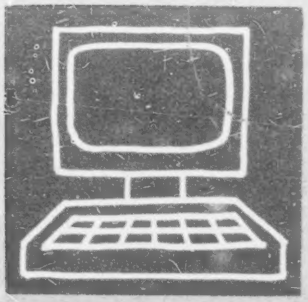
MARKETING & MEDIA DECISIONS

It's a double whammy for b-to-b media strategists: less ad dollars and more media options. Inside, your guide to the business climate, b-to-b broadcast possibilities and the ad-leading businesses, client companies and publications.



HOW BUSINESS TALKS TO BUSINESS



THE BIG SPENDERS
1986 ROME REPORT TOP 100 ADVERTISERS IN BUSINESS TRADE BOOKS

These Rome Report estimates are ranked by division; when division was unknown, ad dollars were assigned to headquarters. Ad dollars are based on one-time rates, plus color and cover considerations.

	Advertiser Name / Division	1986 trade press expenditures (000)	% change over 1985	1986 ad pages	% change over 1985
1	**Dupont Co.**	7,770.1	–22.2	1,542.1	–25.5
2	**IBM Corp.** / National Distribution	7,545.7	–10.1	980.9	17.6
3	**AT&T**	4,351.4	NA	661.8	NA
4	**Caterpillar Tractor Co.**	4,208.3	10.2	896.6	10.5
5	**Compaq Computer Corp.** / Houston, Texas, headquarters	3,993.3	–17.5	467.6	–28.6
6	**Tektronix Inc.**	3,889.1	–12.2	683.5	–7.6
7	**AT&T Information Systems**	3,730.5	–61.0	448.7	–63.0
8	**Scientific Components Corp.** / Mini-Circuits	3,709.1	11.9	824.9	9.3
9	**General Electric Co.**	3,525.3	59.3	643.4	62.4
10	**Texas Instruments Inc.**	3,441.9	–34.2	516.5	–33.5
11	**Xerox Corp.**	3,394.3	–25.3	554.3	–23.4
12	**NEC Information Systems Inc.**	3,372.3	72.8	502.9	83.9
13	**Amer. Gas Assoc.**	3,099.3	79.5	442.7	28.1
14	**Exploration Cruise Lines**	3,097.4	NA	742.0	NA
15	**AMP Inc.**	2,995.3	14.7	509.3	15.7
16	**LH Research**	2,829.9	74.5	469.0	98.7
17	**Procter & Gamble Co.**	2,766.0	0.7	324.2	0
18	**Hewlett-Packard Co.**	2,711.0	NA	509.2	NA
19	**Tyson Foods Inc.**	2,686.4	NA	337.9	NA
20	**Uncle Bens Inc.**	2,558.5	41.4	337.8	42.8
21	**AT&T Technologies Inc.**	2,540.0	132.1	398.3	136.9
22	**Eastman Kodak Co.**	2,488.0	33.8	478.2	–37.7
23	**Cullinet Software**	2,485.3	17.6	294.5	35.5
24	**SAS Institute Inc.**	2,411.9	14.0	223.4	37.7
25	**3M Co.**	2,382.1	76.2	434.6	68.2
26	**Cambro Mfg. Co.**	2,332.1	3.2	260.5	3.6
27	**National Semiconductor Corp.**	2,326.1	57.4	375.6	56.3
28	**Northern Telecom Inc.**	2,261.0	2.4	245.2	–16.9
29	**Alto-Shaam Inc.** / Halo Heat Cook / Serve / Hold Sys.	2,183.5	232.3	282.2	220.5
30	**IBM Corp.** / Nat'l Service	2,168.0	–1.0	356.5	37.5
31	**Televideo Systems Inc.**	2,109.0	–20.4	243.8	–30.6
32	**NCR Corp.**	2,102.3	69.1	351.5	104.0
33	**J.I. Case Co.**	2,084.7	121.0	547.2	115.3
34	**Triangle Publications Inc.** / TV Guide Magazine	2,010.8	10.9	334.6	29.5
35	**AST Research Inc.**	1,985.6	10.5	330.7	27.4
36	**McDonnell Douglas Corp.**	1,968.0	35.6	295.3	21.9
37	**Tandy Corp.** / Radio Shack	1,950.5	105.5	246.6	80.9
38	**AT&T**	1,938.8	NA	223.4	NA
39	**Warner-Lambert Co.** / Parke-Davis	1,928.0	54.5	344.4	47.6
40	**Armstrong World Industries**	1,897.9	60.4	313.8	53.4
41	**Veeco Instruments Inc.** / Lambda Electronics	1,856.9	1.9	307.3	3.7
42	**Hewlett-Packard Co.** / Business Computing Sys.	1,849.2	NA	183.6	NA
43	**Andersen Corp.**	1,837.2	17.8	275.0	10.9
44	**Compaq Computer Corp.**	1,836.4	NA	309.8	NA
45	**Toshiba America Inc.** / Information Systems	1,829.0	40.2	291.4	22.0
46	**Amer. Dairy Association**	1,791.1	NA	183.0	NA
47	**Hitachi America Ltd** / Semiconductor & IC Sales & Serv.	1,785.8	0.05	309.3	3.3
48	**John Fluke Mfg. Co. Inc.**	1,759.1	51.5	298.6	–8.3
49	**Carnation Co.**	1,732.0	49.2	195.1	–33.7
50	**Hall-Mark Electronics Corp.**	1,714.8	53.0	291.9	83.0

Source: 1986, 1985 Rome Report

NA = Not applicable; no division comparison available

THE BIG SPENDERS

1986 ROME REPORT TOP 100 ADVERTISERS IN BUSINESS TRADE BOOKS

	Advertiser Name / Division	1986 trade press expenditures (000)	% change over 1985	1986 ad pages	% change over 1985
51	**Digital Equipment Corp.**	1,707.9	−30.4	195.6	−33.7
52	**Omega Engineering Inc.**	1,704.9	27.1	221.0	26.3
53	**Oracle Corp.**	1,639.9	NA	175.6	NA
54	**Hearst Corp.**	1,603.3	15.7	227.7	11.3
55	**ICI Americas Inc.** / Stuart Pharmaceuticals	1,603.2	−11.4	291.0	− 2.3
56	**Glaxo Inc.**	1,575.3	44.5	324.8	40.3
57	**Quaker Oats Co.** / Food Service	1,572.7	8.7	200.8	− 7.8
58	**AT&T Network Systems**	1,542.3	−22.1	348.1	−40.3
59	**Owens-Corning Fiberglas Corp.**	1,541.4	NA	262.6	NA
60	**Sugar Foods Corp.**	1,537.5	22.2	190.0	15.2
61	**Panasonic Industrial Co.**	1,506.7	11.0	383.6	29.3
62	**Del Monte Corp.**	1,500.8	180.9	153.0	200.0
63	**Pierce Foods Corp.**	1,485.0	81.5	184.1	84.0
64	**Dow Jones & Co.** / Wall Street Journal	1,483.2	57.9	241.7	66.2
65	**Avis Rent-A-Car System Inc.**	1,474.5	NA	399.3	NA
66	**Equipto Co.**	1,459.9	NA	203.1	NA
67	**Software AG of North America Inc.**	1,442.8	4.3	148.3	20.3
68	**Inmos Corp.**	1,429.1	116.8	230.0	101.8
69	**RCA Corp.** / Solid State	1,424.0	NA	238.0	NA
70	**Lotus Development Corp.**	1,422.0	60.5	150.6	48.5
71	**Hayes Microcomputer Prod. Inc.**	1,410.0	87.5	180.0	93.5
72	**Bell Atlantic Corp.**	1,403.4	159.8	193.9	179.7
73	**Alamo Rent-A-Car**	1,395.1	NA	282.5	NA
74	**United Airlines**	1,394.1	NA	304.8	NA
75	**Rich Products Corp.**	1,370.2	28.0	225.1	46.1
76	**Fairchild Semiconductor Corp.**	1,366.0	NA	217.6	NA
77	**Kapco Inc.**	1,351.7	10.6	234.1	0.04
78	**Data General Corp.**	1,341.2	124.6	179.7	225.5
79	**Princeton Graphic Systems**	1,334.8	37.5	139.6	18.6
80	**Alps America**	1,332.6	NA	145.0	NA
81	**Ford Motor Co.** / Parts & Service	1,331.0	42.2	218.0	70.3
82	**Intel Corp.** / Literature Dept.	1,330.1	8.6	238.0	3.5
83	**CPC Int'l. Inc.**	1,303.4	7.5	165.0	− 2.4
84	**Control Data Corp.**	1,302.8	−41.1	196.6	−39.1
85	**Advanced Micro Devices Inc.**	1,302.7	−33.4	214.0	−32.1
86	**3M Co.** / Commercial Chemicals	1,296.8	2.9	222.0	− 6.7
87	**WR Grace & Co.** / Cryovac	1,296.2	38.6	125.8	33.0
88	**General Motors Corp.** / AC-Delco	1,296.0	9.9	201.2	13.6
89	**Borland Int'l**	1,293.4	−17.7	197.2	40.7
90	**Toshiba America Inc.**	1;289.5	− 1.2	218.6	− 4.0
91	**Holland America Line**	1,277.8	NA	303.4	NA
92	**Goodyear Tire & Rubber Co.**	1,273.7	54.3	234.0	52.9
93	**Wyse Technology** / Marcom Dept.	1,269.1	53.1	167.0	101.2
94	**Ciba-Geigy Corp.** / Geigy Pharmaceuticals	1,264.7	179.6	273.0	160.0
95	**Hobart Corp.**	1,257.9	3.5	132.7	25.7
96	**Honeywell Inc.** / Micro Switch	1,255.6	14.1	187.6	4.5
97	**Beatrice Grocery Group**	1,249.4	NA	145.0	NA
98	**Intergraph Corp.**	1,232.1	106.4	214.2	91.1
99	**Square D Co.**	1,222.9	−15.7	185.7	−19.9
100	**Ethyl Corp.** / Chemicals Group	1,213.7	11.9	235.0	− 2.1

Source: 1985, 1986 Rome Report

NA = Not applicable, no division comparison available

THE BUSINESSES, THE BUYERS, THE BOOKS

TOP FIVE ADVERTISERS

	Company	Ad Revenues (000)	% change 1986/1985	% change 1985/1984	Pages	% change 1986/1985	% change 1985/1984
AUTOMATIC DATA SYSTEMS	•IBM Corp. (Montvale, N.J.)	5,153.1	+936.2	*	567.5	+121.8	*
	AT&T Info Systems (Jacksonville, Fla.)	3,403.0	−42.3	+136.7	378.7	+2.2	+91.4
	Compaq Computer (Houston, Tx.)	3,229.2	+15.7	+159.6	350.7	+18.2	+230.5
	NEC Information Systems (Boxborough, Mass.)	2,983.5	+82.9	+11.3	443.9	+103.2	+2.8
	SAS Institute (Cary, N.C.)	2,380.7	+12.5	+68.5	212.4	+30.9	[illegible]
ELECTRONIC ENGINEERING	Scientific Components (Mini Circuits) (Brooklyn, N.Y.)	3,709.2	+11.9	−26.1	824.9	+9.3	−35.6
	LH Research (Tustin, Calif.)	2,829.9	+74.5	NA	469.0	+98.7	NA
	Tektronix (Beaverton, Ore.)	2,815.4	+6.0	−7.0	514.5	+4.9	−14.8
	National Semiconductor (Santa Clara, Calif.)	2,305.9	+96.8	−7.6	377.0	+99.5	−18.2
	ATT Technologies (Allentown, Pa.)	2,103.5	+139.8	NA	335.0	+48.1	NA
RESTAURANTS & FOOD SERVICE	American Gas Assn.	3,065.9	+155.4	*	437.0	+104.2	*
	Tyson Foods	2,686.4	+218.2	*	337.9	+215.0	*
	Uncle Ben's	2,558.5	+41.4	+107.5	337.8	+42.8	+77.4
	Cambro Manufacturing	2,332.1	+3.2	+0.5	260.5	+3.6	−19.8
	Procter & Gamble	2,021.0	+4.7	+27.6	225.8	+4.2	+20.7
AUTOMOTIVE-RELATED GOODS & SERVICES	Ford Motor (Parts & Service Div.)	1,031.9	+47.5	−12.3	178.0	+76.2	−30.8
	MOOG Automotive	907.7	+17.3	+49.2	140.3	+17.6	+24.0
	General Motors (AC-Delco Div.)	849.4	+9.5	+20.0	125.0	+8.7	+2.7
	Champion Spark Plug	799.4	−33.5	+51.8	132.0	−25.8	+35.9
	TRW (TRW Replacement Div.)	791.8	+53.6	−1.9	127.4	+62.8	−26.4
AVIATION & AEROSPACE	McDonnell Douglas	1,605.7	+51.8	+30.0	233.1	+47.5	14.5
	Beech Aircraft	853.9	−5.7	+72.1	86.0	−9.5	[illegible]
	King Radio	699.1	−49.1	+68.7	78.8	−45.1	+91.4
	Cessna Aircraft	537.6	−9.6	+76.3	47.0	−16.1	[illegible]
	Atlantic Aviation	532.6	+41.1	−51.3	63.5	+31.3	[illegible]

* No data, 1985, 1984
• Tabloids
NA – Not applicable

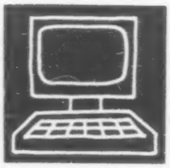
Presenting, in descending order, the top ten Standard Rate & Data Service categories as ranked by Rome Report's 1986 trade book ad investment estimates. Under each heading are the year's top five advertisers by dollars invested and the top five magazines by total ad revenues. A historical perspective is provided via plus or minus percentages for dollars and pages. Rankings are by division, when available, and ad expenditures are determined by one-time rates, with consideration for color or cover positioning. The last entry identifies the hottest trade magazine categories by revenue gain in 1986.

TOP FIVE PUBLICATIONS

Magazine Title	Ad Revenues (000)	% change 1986/1985	% change 1985/1984	Pages	% change 1986/1985	% change 1985/1984
•Computerworld	49,242.2	+12.1	−9.1	4,044.8	+30.2	−19.8
Byte	34,668.9	+8.0	+0.9	3,338.7	−0.7	−8.7
Datamation	20,031.9	−12.2	+11.8	1,988.2	−19.3	+1.8
Computer Reseller News	18,878.5	*	*	4,260.8	*	*
Personal Computing	18,529.0	−10.8	−4.3	1,556.0	−8.0	−8.8
EDN	29,521.9	+0.7	+0.8	4,937.1	−7.6	−8.6
Electronic Design	25,182.2	−6.7	−7.2	4,108.6	−11.4	−1.9
•Electronic Engineering Times	22,533.1	+5.9	+43.0	3,140.5	+30.4	+28.2
•Electronic News	15,859.8	−21.3	−13.9	2,362.0	+5.3	−22.1
•Electronic Buyer News	4,677.8	−9.3	−11.7	2,807.5	+4.1	−13.4
Restaurant & Institutions	43,035.1	+6.5	+17.8	4,355.8	+0.2	+6.1
Restaurant Business	23,462.1	+11.3	+16.3	2,936.9	+1.4	+3.3
Nation's Restaurant News	22,831.1	−0.3	+26.2	2,587.5	+22.5	+23.7
Restaurant Hospitality	9,413.8	+9.5	+24.8	1,271.5	+1.2	+9.3
Institutional Distribution	9,166.6	+10.1	+13.4	1,692.4	−2.3	+1.3
•Automotive News	11,165.4	−2.2	+16.6	1,819.8	+13.8	+1.6
Motor	5,024.2	+3.3	+24.5	618.8	−4.0	+14.6
Automotive Industries	4,465.6	+23.7	+45.7	781.1	+15.9	+26.9
Automotive Marketing	4,018.5	+11.2	+2.0	716.0	+4.4	−8.7
Motor/Age	4,007.7	+7.3	+16.7	506.1	+7.4	+8.0
Aviation Week	25,934.8	−9.8	+17.4	2,912.0	−9.3	+5.0
Business and Commercial Aviation	10,220.5	−5.4	+2.7	771.5	−9.9	−6.8
AOPA Pilot	4,952.8	+8.2	*	488.3	+1.9	*
Air Transport World	4,535.5	+0.1	+25.5	854.5	−4.8	+15.4
Air Force	3,642.7	+9.7	+11.1	704.3	+4.9	−0.4

1986 Ad Revenue Total: $270.9 million

% Change, 1986 vs. 1985: −1.7%



1986 Ad Revenue Total: $220.0 million

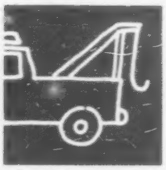
% Change, 1986 vs. 1985: −5.2%

1986 Ad Revenue Total: $133.6 million

% Change, 1986 vs. 1985: +6.3%

1986 Ad Revenue Total: $76.1 million

% Change, 1986 vs. 1985: +2.8%



1986 Ad Revenue Total: $63.1 million

% Change, 1986 vs. 1985: −4.5%

TOP FIVE ADVERTISERS

	Company	Ad Revenues (000)	% change 1986/1985	% change 1985/1984	Pages	% change 1986/1985	% change 1985/1984
BUILDING	Anderson	1,067.5	+13.6	+21.5	146.7	+0.7	+12.4
	Masonite	786.4	+216.5	NA	87.0	+200.0	NA
	Owens-Corning Fiberglas	780.0	−14.7	−36.3	110.0	−20.3	−37.8
	Merillat Industries	708.4	+36.2	−14.2	106.6	+23.3	−22.5
	Georgia-Pacific	698.4	+29.7	+8.7	99.0	+7.6	+19.5
METAL, METALWORKING & MACHINE	Cincinnati Milacron	571.0	+22.0	−12.8	135.0	+19.5	−27.1
	Carpenter Technology (Carpenter Steel Div.)	396.1	−20.6	−2.7	75.0	−21.9	−11.9
	Kennametal (Machining Systems)	361.1	+108.7	NA	84.0	+95.3	NA
	IBM	323.7	*	*	64.0	*	*
	Machine Tools of Spain	312.5	+333.3	*	56.8	+229.4	*
PRODUCT DESIGN ENGINEERING	Dupont	1,280.8	−11.6	*	190.2	−22.8	*
	3M (Commercial Chemicals Div.)	802.8	+4.6	+3.1	124.0	−1.6	−6.0
	Penton/IPC (Education Div.)	559.9	NA	+175.0	102.3	NA	+100.2
	Klinger Scientific	448.9	481.6	+71.1	67.1	+318.8	+100.0
	Square D	438.6	−2.7	+3.7	63.5	−0.5	−1.6
CHEMICALS & CHEMICAL PROCESSING	Ethyl Corp. (Chemical Group)	993.5	+3.3	+108.0	187.0	−11.4	+102.9
	Air Products & Chemicals	593.5	+71.9	+141.3	73.5	52.1	+108.7
	American Chemical Society	457.0	+162.2	*	67.3	NA	*
	Amoco Chemical	345.6	+42.6	+11.0	46.7	+48.4	+0.5
	Air Chemical Society (Distribution Dept.)	313.3	*	*	41.9	*	*
TELECOMMUNICATIONS TECHNOLOGY	AT&T Network Systems	1,525.2	−20.2	+89.3	345.8	−39.8	+36.8
	AT&T (could not determine division)	1,167.4	*	*	214.5	*	*
	NEC America (Radio & Transmission Div.)	891.1	+110.1	+177.1	196.5	+102.1	+142.5
	AT&T Technologies	862.7	*	*	204.4	*	*
	MCI Communications	558.4	+708.7	*	102.0	+684.6	*

The 10 Fastest Growing Business-to-Business Publication Categories (Ranked by Percentage Gain)

SRDS	Category	1986 Ad Revenues (000)	% change over 1985
87	Medical and Surgical	$18,005.8	+23.2%
132B	School Administration	9,210.4	+22.1
36	Drugs, Pharmaceuticals	35,995.7	+20.3
95	Motion, Talk, Sound, Commercial Pictures, etc.	2,079.3	+19.9
78	Laundry and Drycleaning	2,520.4	+17.9

* No data, 1985, 1984
* Tabloids
NA—Not applicable

TOP FIVE PUBLICATIONS

Magazine Title	Ad Revenues (000)	% change 1986/1985	% change 1985/1984	Pages	% change 1986/1985	% change 1985/1984
Professional Builder	15,899.3	+26.1	+12.1	1,693.8	+17.1	+0.9
Builder	12,114.8	+18.4	+15.7	1,176.5	+25.3	+2.8
•National Home Center News	9,914.9	+0.2	+23.8	1,428.9	+21.4	+11.7
Building Supply Home Centers	5,680.1	−20.7	+0.2	1,097.6	−27.4	−8.4
Home Center	3,849.5	−17.2	+21.3	819.8	−26.4	+12.1
American Machinist	6,526.9	−22.3	+9.5	1,387.8	−7.2	+0.3
Modern Machine Shop	5,699.2	+20.4	+19.0	2,385.8	+10.9	12.0
Iron Age	5,211.1	−17.8	+6.4	820.8	−21.8	−7.3
Tooling & Production	4,491.5	−12.2	+5.0	1,221.5	−19.4	−4.2
Machine & Tool Blue Book	4,485.3	+33.8	+37.7	1,215.5	+18.9	−10.1
Machine Design	23,361.4	+5.6	+1.1	3,767.9	−1.0	−4.6
Design News	20,885.8	+14.2	+3.0	3,225.0	+6.4	−4.1
•Product Design & Development	7,356.3	+53.6	−25.6	679.2	+55.0	−27.2
Plastic Design Forum	2,317.5	+24.8	+17.4	453.7	+3.7	+6.1
Design Graphic World	828.5	+14.8	+9.1	227.1	+10.2	+1.0
•Chemical Engineering	10,143.9	−0.2	+2.8	1,661.8	−6.3	−1.2
Chemical Week	8,771.7	+6.1	+14.9	1,119.9	−2.8	+4.9
Chemical & Engineering News	5,988.5	+8.8	+10.4	752.7	+4.4	−10.0
Chemical Processing	5,537.3	−16.9	−2.2	1,112.2	−23.2	+11.4
•Chemical Equipment	4,469.0	−6.8	+5.6	539.7	−2.0	+2.4
Communication Week	16,624.8	+58.3	*	1,880.7	+51.0	*
Telephony	8,450.4	+10.3	−12.8	2,939.6	−0.8	−8.5
Telephone Eng. & Mngt.	5,823.7	+1.4	−11.3	2,039.1	−9.4	−1.9
Telecommunications	5,804.8	−5.5	+13.2	964.3	−14.5	+22.4
•Communications News	4,133.0	−31.9	−15.3	527.1	−29.7	−22.8

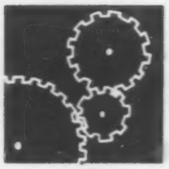
SRDS	Category	1986 Ad Revenues (000)	% change over 1985
114	Plastics and Composition Products	$21,573.1	+39.2%
54	Furniture and Upholstery	6,956.9	+32.0
10	Banking	30,192.7	+28.1
115B	Pollution Control (Air & Water)	4,843.7	+26.1
34	Control and Instrumentation Systems	26,289.1	+24.1

1986 Ad Revenue Total: $59.5 million

% Change, 1986 vs. 1985: −2.4%

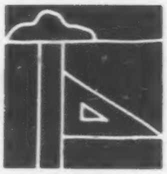
1986 Ad Revenue Total: $58.6 million

% Change, 1986 vs. 1985: +1.0%



1986 Ad Revenue Total: $55.3 million

% Change, 1986 vs. 1985: +14.4%

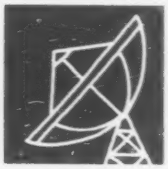


1986 Ad Revenue Total: $47.4 million

% Change, 1986 vs. 1985: −6.3%

1986 Ad Revenue Total: $47.1 million

% Change, 1986 vs. 1985: +11.6%



“The audience is so targeted that we actually reach our target decision m

ning yet another addition to its seven-show business lineup, a personal investing show called *Marketline*. “But when everybody jumped on the bandwagon,” says John Barbera, senior vice president, head of sales for CNN, “our growth slowed.” That proved to be fatal news for *Marketline*. Barbera says revenue growth for the current CNN business shows fell this year to 18% from last year's torrid 55% increase. (Almost all of this year's jump is from price increases.)

But despite the category's woes, there remains an encouraging well of interest. In fact, some media experts say they would like to see — and would support — some additional shows, if only someone would air them. Debra Kassidis at William Esty puts almost 5% of the Travelers television budget into business shows. “We sponsor the small-business segment on *Nation's Business Today*,” she says, “and we'd like to see someone devote a whole show to small business. And one to working women. I've been suggesting a new show to CNN without any luck. The broadcasters think they've filled the need, but I don't know if they realize how much viewers have changed.”

Kassidis says the media opportunity is so exceptional that business-to-business advertisers who have thus far avoided tv should hurry up and come

A BUSINESS BUYER'S GUIDE TO BROADCAST AND CABLE

CABLE

Cable News Network

Programs: Weekday programs include *Business Morning, Business Day, Moneyline, Your Money* and *Market Updates*. Weekend shows: *Money Week, Pinnacle, Inside Business*.
Description: Cable network provides indepth analyses, interviews, commentaries and panel discussions pertaining to market news. Previews of market performance based on earlier foreign trading. Personal finance. Corporate executive profiles.
Time periods: 6:30 a.m.-11:30 p.m., Monday-Friday; 9:30 a.m.-11:30 p.m., weekends.
Markets: top 100.
Ratings: 0.4 - 1.7.
30-second commercial: $1,450-$3,900; *Market Updates:* $642.
CPM: $9-$11, depending upon the show; $2: *Market Updates*.
Advertising categories: corporate image, insurance, commercial real estate, financial services, industrial.
Revenues: $13 million-$15 million in 1986; expected to increase 18% in 1987.

ESPN

Program: *Nation's Business Today*.
Description: CEO close-up's, technology updates, money matters, weather and sports. Produced by Biznet, a division of the U.S. Chamber of Commerce.
Time periods: 6:30 a.m.-8:30 a.m. Monday-Friday; three updates each evening.
Markets: top 100.
Ratings: 0.2-0.3.
30-second commercial: $750.
CPM: $2.
Revenues: not available.
Advertising categories: corporate image, automotive, banking, life insurance, credit cards, beers, airlines, rental cars, hotels, computers, insurance brokerage.

Financial News Network

Programs: Include *International Market Report, World Business Update, Business Focus Programing, FNN Morning News, Morning Marketline, Consumer Corner, Wall Street Countdown, Money Talk* and *Wall Street Final*.
Description: cable network with 18 programs providing financial news and information geared to investors and potential investors in Wall Street, commodities, real estate, bonds, etc.
Time periods: 6 a.m.-7 p.m., Monday - Friday.
Markets: top 100.
Ratings: 0.4-0.6.
30-second commercial: $500-$1,000 depending upon the show.
CPM: $3.50-$4.50.
1986 Revenues: $11 million; expected 1987 Revenues: $12 million-$15 million.
Advertising categories: Direct response, program segment sponsorship sales, and national advertising, including automotive, electronic equipment, financial, travel, credit cards and commodity services.

LOCAL STATIONS

NBC O&O's

* **Program:** *Strictly Business*.
Description: Local program produced by WNBC-TV, New York and fed to O&O stations in Los Angeles, Chicago, Washington, D.C. and Cleveland. Syndication handled by LBS up until March. Analysis of week's business news.
Time: 7:00 - 7:30 p.m., Saturday.
Markets: Five.
Ratings: 5.4 (New York market).
30-second commercial: not available.
CPM: not available.
Revenues: not available.
Advertising categories: brokerage houses, financial institutions, auto manufacturers, communications and airlines.

NETWORK

ABC

Program: *Business World*.
Description: Guests discuss week's major business and financial news and preview

kers at a discount.”

aboard. “First,” she says, “the audience is so concentrated that we actually reach our target decision makers at what amounts to a discount. You're also getting people with a serious commitment to the subject and you're getting the power of the medium.” Furthermore, she adds, “Business tv is a terrific way to extend your reach against light viewers and to increase your frequency against the target you hit with sports and news.”

But where are these dollars coming from? In a sluggish ad environment, isn't someone getting hurt? “The dollars we put into the business shows,” says Watson of AT&T, “generally come from network fringe, news and prime time, and perhaps from local as well.”

Weissenberger says many advertisers like U.S. Sprint have gradually been moving away from news because it is “expensive and skews older and female.” She says U.S. Sprint's absence from business books for the first quarter of 1987, however, had nothing to do with the decision to rev up spending on business tv. “It was just a strategic decision,” she says.

Although, by allegedly strict media definition, ad money for business tv shows almost always comes from “tv money,” or dollars used more to project image than to actually sell, the sit-

xt week's investment news. Entrepre-
arial tips.
me periods: 11:00 a.m.-11:30 a.m.,
nday; 12:30 p.m.-1 p.m., Sunday.
rkets: 100.
tings: 1.7.
second commercial: $10,000.
M: $6.70.
venues: $6.2 million.

ogram: *Business Brief.*
scription: business updates of current
vs.
me periods: one-minute insert in prime
e, Monday-Friday.
rkets: 190.
tings: 11.5.
second commercial: $45,000.
M: $4.48 (15 second).
venues: $5.9 million.
ote: Figures relate to network sales; net-
rk sales time Tues., Thurs., and alter-
e Mondays/local stations: Wednesday,
day and alternate Mondays.).

ogram: *World News This Morning: The*
siness Report
scription: financial and economic re-
ts, breaking news from overseas mar-
s.
me periods: 6:15 a.m.-6:30 a. m., Mon-
-Friday.
rkets: 113.
tings: 1.4.
second commercial: $2,500.
M: $2.04.
venues: $3.9 million.
vertising categories: computers, tele-
mmunications, hotels, automotive, credit
ds, banking, insurance.

Wall Street Journal/NBC
Program: *Before Hours.*
Description: 15-minute recaps of foreign and domestic market news, also a weather report. Began in March.
Time periods: 5:45 a.m.-6:45 a.m., Monday-Friday.
Markets: 106.
Ratings: 0.5.
30-second commercial: Not available.
CPM: not available.
Revenues: not available.
Advertising categories: Has sold two half-sponsorships (two 30-second commercials) to Stouffer Hotels and Financial Services.

PUBLIC TELEVISION

Program: *Adam Smith's Money World.*
Description: Produced by Channel 13, New York. Thumbnail sketches attempt to demistify the week's economic news.
Time periods: 6 p.m.-6:30 p.m. Saturday, 6:30 p.m.-7:00 p.m. Sunday. In New York: 8:30 p.m., Monday.
Markets: 219.
Ratings: 0.2.
Underwriting cost: 52-week series of shows for $1.3 million.
Sponsor: Metropolitan Life.

Program: *Nightly Business Report.*
Description: Produced by WPBT in Miami, Fla. Day's market news with attention to political influences.
Time periods: 6:30 p.m. Monday-Friday, but runs other times at individual station discretion.
Markets: 260.
Ratings: 0.2.
Underwriting cost: Undisclosed.
Sponsors: Kidder Peabody, Digital Equipment.

Program: *Wall Street Week.*
Description: Produced by Maryland Public Television. A look at investing and anything that affects it, with one guest per week.
Time periods: 8:30 p.m. Friday, runs other weekend times at discretion of local station.
Markets: nearly 300.
Ratings: 4.0-5.0.
Underwriting cost: Undisclosed.
Sponsors: American Can Company, Prudential Bache Securities and Hanson Trust.

SYNDICATION

Today's Business Inc.
**** Program:** *Today's Business.*
Description: Recently dropped by syndicator, Buena Vista. Recap of market news, economic and financial reports.
Time periods: 6 a.m.-6:30 a.m., Monday-Friday and weekend mornings.
Markets: 144.
Ratings: 1.4.
30-second commercial: $5,000.
CPM: $3.
Revenues: $3.3 million (September - 29, 1986 - April 1987)
Advertising categories: Airlines, media, telecommunications, computers, financial services, auto manufacturers.

*Recently dropped from syndication, but airs on NBC O & O stations

**Recently dropped from syndication

Rebecca Fannin

Source: Suppliers; *M&MD*.

BRAND REPORT

No. 142: Wine Coolers

COOL(ERS)
AND THE GANG

by Paula Schnorbus

Glug, glug, glug. Advertising dollars are flowing into the fledgling-but-fizzing wine cooler industry as fast as the hope that consumers' thirst for the brews will spell relief from the sales drought spoiling the alcoholic beverage industry. A barful of brands are spending furiously — estimates are that the overall cooler category will plunk down $200 million on advertising this year — to win the war of the gullet.

What a difference a couple of years makes. When the cooler business first began to take off, wisdom had it that new entries needed to ante up about $10 million in advertising monies to become serious national contenders. Several months later, that figure ballooned to $25 million. And now, a vi-

WINE COOLERS 1986 MEDIA EXPENDITURES (000)

	Media Total	Magazines	Newspapers*	Network Television	Spot Television	Network Radio	Outdoor	Cable TV Networks	Spot Radio**
Bartles & Jaymes	31,173.4	–	82.5	26,582.6	3,759.6	–	–	27.2	721.[illegible]
Seagram's Coolers	27,720.4	538.2	894.7	21,123.6	2,519.1	1,859.0	–	535.9	187.3
California Cooler	22,195.2	–	–	18,137.3	2,538.2	–	415.1	506.1	2,[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	–	[illegible]	[illegible]
[illegible]	[illegible]	–	[illegible]	–	[illegible]	[illegible]	–	[illegible]	[illegible]
[illegible]	[illegible]	–	–	–	[illegible]	–	–	[illegible]	[illegible]

*Source: Leading National Advertisers; LNA lists no spending in Sunday magazines for profiled brands; *Media Records; **Radio Expenditure Reports*

JENNY ADAMS

able competitor must duke it out with no less than $40 million to stay in the ring. But there's good reason: Since the fruit and wine mixture was first marketed in 1981, coolers have burgeoned into a $1.7 billion business, or an estimated 75 million case depletions in 1986, according to *Impact* Databank, which tracks the wine and spirits industry.

While advertising expenditures have been mushrooming, the variety of coolers has been mutating. Because liquor laws prohibit wine-based products in certain states, malt-based coolers have been rolled out. Some of these are finding favor in the field. Stroh's White Mountain Cooler, for instance, has grabbed the fourth spot in the overall cooler market with a 10.3% estimated market share.

Spirit-based coolers also have hit the cold boxes in liquor stores. Indeed, it's getting to the point where the number of cooler flavors is beginning to mimic the ice cream options in a Baskin-Robbins store. A cooler may be the traditional white wine and fruit juice combo, chocolate, or for those who don't like their whiskey straight, there is a Jack Daniel's Tennessee Cooler.

But even more mind-boggling is the number of cooler entries in the marketplace. In 1985, there were about 150 brands in the U.S., according to Beverage Marketing Corp. But the predicted shakeout has begun and currently, there are about 125 to 135 coolers still battling it out for limited shelf space. Wine coolers dominate the field and account for at least 100 of the remaining brands.

The cooler craze started in 1981 when Stuart Bewley and Michael Crete's wine cooler "formula" outdrew a keg of Michelob at a party. Their California Cooler — which was bought by Brown-Forman Corp. in 1984 for $55 million in cash plus another $83 million, if volume meets expectations — was created with a health and drunk-driving-conscious society in mind. Wine coolers contain fruit juice and are lower in alcohol content than most alcoholic beverages. The beverage is aided by the myth that it is lower in calories, although a cooler has 200 to 270 calories per 12-ounce bottle.

Noting the success of this backyard invention and the dispiriting sales of spirits, distillers and vintners began mixing their own concoctions, leading up to the staggering number of brands on the market today. The leader of the pack, or the "four-pack" as coolers are sold, is E&J Gallo Winery with its phenomenally successful Bartles & Jaymes wine cooler (see *M&MD*, March 1987). Gallo entered the cooler wars just two years ago, armed with a fat ad budget and a clever campaign featuring a couple of droll "spokesmen" named Frank Bartles and Ed Jaymes. It didn't hurt that Gallo possesses a mighty distribution system and salesforce capable of kicking the other cooler contenders behind the knees.

THE REAL STUFF

California Cooler, the original, calls itself "The Real Stuff."

While rival companies produced more and more line extensions of cooler flavors, Bartles & Jaymes, with its singular flavor, lapped up market share. In 1986, *Impact* Databank reports Bartles & Jaymes' market share at 22.7% and California Cooler's at 17.3%, a near transposition of their 1985 market shares, which were 17.5% for Bartles & Jaymes and 26.8% for California Cooler.

Speculation abounds as to why California Cooler was unseated as the biggest brand, aside from Gallo's extremely effective ad campaign. One theory is that Bartles & Jaymes isn't pulpy with fruit, and its packaging more closely resembles a wine bottle. California Cooler also had distribution problems. Beer distributors were used initially, and although their visits to retailers were frequent, their territories were smaller than wine distributors. Sometimes several beer distributors — each with a different price — would call on a supermarket chain, while one wine distributor would call with one price. And, *Impact* Databank reports that California Cooler was the most expensive of the big cooler brands in 1986 at $3.80 a four-pack.

Meanwhile, Joseph E. Seagram & Sons Inc. sold off most of its wine holdings for about $200 million in cash to concentrate on its premium wines and, the company says, make a "major commitment to wine coolers, which is the most rapidly growing segment in the beverage alcohol business." The company has been hustling its products via *Moonlighting*'s Bruce Willis. Asked if the coolers currently are a profitable business, given the exorbi-

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DIALOGUE MARKETING 800

RUPPMAN MARKETING SERVICES, INC.

1909 E. Cornell, Peoria, Illinois 61614

tant amounts spent on advertising, Henry Hawley, vice president, product group director for Seagram Wine Co., replies, "It is a business with an enormously bright future."

Howard Jacobson, director of marketing at Canandaigua Wine Co., which markets Sun Country coolers, says, "We hope that there will be money to be made some day." Pointing to heavy wine cooler expenditures, he adds, "We're hoping in the short term that we may be able to generate some profits."

In their short existence, wine coolers have been traditionally pitched to people in their 20's. That means network and cable tv advertising, especially on MTV, has been popular. Eye-catching packaging and point-of-display materials, including stacker cards and case cards, are also used extensively to market the beverages. Some companies have pitched products specifically to women because they have been more receptive to coolers. Supermarket liquor buyers say shelf space — which is getting increasingly harder to secure — is determined by who is selling the most. Gallo's introduction of a new red wine cooler won't help matters. "The question is who is going to come off the shelf," says Michael Bellas, president of Beverage Marketing Corp.

Consequently, coolers are setting off in different directions. Some of the big brands are being pitched to a broader age group. They also may be advertising year-round rather than just during the summer months. Other companies, rather than pumping up their ad budgets, are finding regional niches. It is probably a good idea since it is estimated that eight wine coolers with national distribution had almost 80% of the market share in 1986.

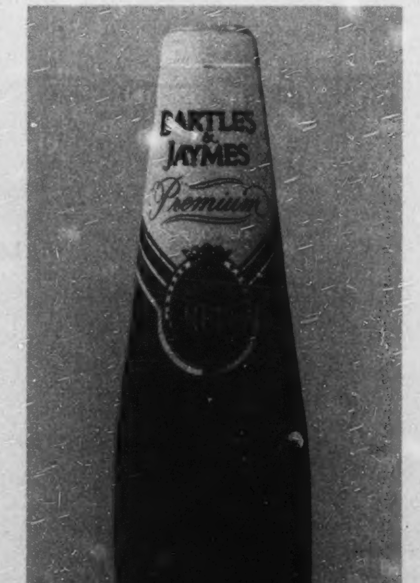
Some wonder if coolers are a fad like the pop wines of some 15 years ago. Back then, Boone's Farm — out of Gallo — was a big deal. David Brennan, beverage alcohol buyer for Von's Grocery Co., El Monte, Calif., thinks coolers will last longer than the six-year pop wine fad, but he maintains, "I still sell a lot of Boone's Farm."

Following are the eight top wine coolers according to estimated market share in 1986 as reported by *Impact* Databank. They are Bartles & Jaymes with 22.7%; California Cooler, 17.3%; Sun Country, 13.3%; Calvin Cooler, 7.6; Seagram's Premium Wine Cooler, 7.1%; Seagram's Golden Wine Cooler, 5.3%; 20/20 Wine Cooler, 2.4%; and Dewey Stevens Premium Light, 2%.

BARTLES & JAYMES

The long-awaited line extension from Gallo's Bartles & Jaymes original white wine and citrus flavor is finally here. The new Premium Red is being rolled out with "spokesman" Frank Bartles encouraging consumers to "Try Ed's new premium red." Ed, of course, is his "silent partner," Ed Jaymes.

Introductory materials explain that the public is interested in flavored wine coolers, but "no flavored wine cooler has maintained high sales levels over an extended period of time." Gallo cites a Nielsen scantrack that shows orange-flavored cooler case sales — which have the longest sales history of all flavored coolers — have declined 13% from summer 1985 to summer 1986. Sales of the flavor known as "tropical" are shown to have a rocky sales curve that peaked about a year ago and has dipped ever since. Most



Bartles & Jaymes' new red wine cooler is hitting the shelves.

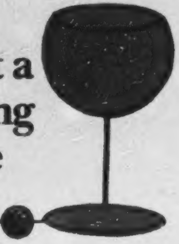
interesting are sales of peach wine coolers, which was the "bandwagon" flavor within the past year. Nielsen's scantrack shows that sales climbed until December and now appear to be dropping off.

Gallo also says its research shows that flavored wine coolers currently aren't rated light or thirst quenching enough.

Hal Riney & Partners Inc.'s new creative featuring "Frank and Ed" reportedly has about 1,200 GRP's behind it. The media schedule is expected to include *Murder, She Wrote, The Tonight Show*, Joan Rivers' *The Late Show, The Colby's, Saturday Night Live*, specials and late-night movies. One source said of the two Bartles & Jaymes flavors, only Ed's Red will be advertised during May and June.

Gallo is also experimenting with cosponsoring promotional events, "something many other people have been involved with for several years," says a Gallo spokesman. This is quite a change of heart for Gallo, which historically has not believed in an alcoholic beverage sponsoring sports or other events.

Bartles & Jaymes, with its singular flavor, gulped away at market share while other cooler companies pumped out a mindboggling array of line extensions.



The original Bartles & Jaymes wine cooler has its seasonal advertising in full swing, with a recent tv spot celebrating the first day of spring. Frank thought "Vernal Equinox Day" was in commemoration of a childhood friend he and Ed thought would never make it that big. Springy point-of-sale materials include the "thirst rescue dog," and Frank and Ed advertising "the perfect cooler for spring." Ed, with a towel slung over his shoulder, totes a beach ball and scuba gear.

Last year, according to LNA, Bartles & Jaymes spent $30.4 million on television, with nothing on magazine or outdoor advertising. About $26.6 million was spent on network tv $3.8 million on spot tv and $27,200 on cable tv. Media Records says newspaper expenditures in 1986 were $82,476. For spot radio, $721,522 was spent in 1986, says Radio Expenditure Reports.

CALIFORNIA COOLER

The original wine cooler, the one that gave us another reason to hate California (as its initial ad campaign put it) and then came out with ads reminiscent of *Beach Blanket Bingo*, has a new tactic.

Says Jon Shastid, senior vice president, director of marketing at Brown-Forman Corp., "We have taken the party off the beach. It's not just for parties or large occasions. It's appropriate in smaller groups and off the beach."

The "Real Stuff" campaign is being revamped to appeal to a broader age range that includes those over 35. California Cooler also will be pitched in nine new 15-second commercials by Chiat-Day as well as five :30's and one 60-second spot. All told, the budget is more than $40 million, including advertising and promotion.

"We didn't have 15-second ads last year," says Shastid. "But they allow us to be tactical. There is an enormous efficiency in using :15's provided you have the right creative," he says. Last year, the cooler used about three :60's and four :30's.

Tv ads for California Cooler will zero in on the big summer holidays: Memorial Day, Independence Day and Labor Day. Even income tax time was hit with a commercial that shows a liter bottle of the cooler and a smaller bottle with the punch line that the coolers come in "long form and short form." A baseball-oriented commercial invites us to "enjoy one of America's favorite pastimes, and while you're at it, you may want to watch a little baseball." There is also an ad execution for basketball games.

Your advertising dollars work in

COLUMBUS, OHIO

An affluent marketplace where effective buying income exceeds $15 billion. And one medium *The Columbus Dispatch* reaches more than half the population daily (52%) and almost three-quarters on Sunday (72%).

Call National Advertising Manager, Leonard Zane for more information and advertising assistance at (614) 461-5188; in Ohio call 1-800-282-0263.

The Columbus Dispatch
Morning & Sunday

Coolers attract women by buying time on soap operas.

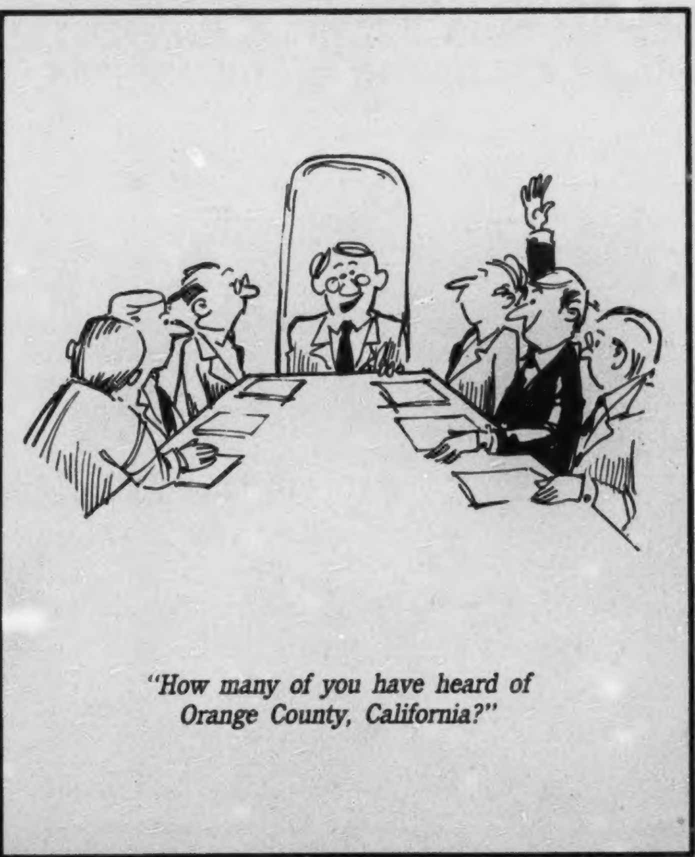
California Coolers are advertised on network, spot and cable tv, network and spot radio. Ads appear on *Cheers, Moonlighting* and *Miami Vice*, and on the network and local news on a spot basis. Shastid says negotiations are under way for time on network news and newsbreaks during summer and fall.

Cooler ads also can be seen on ABC daytime soap operas because women, a target audience, watch the programs. "It's difficult to get a preponderance of women in prime time," observes Shastid, who calls daypart advertising a "very efficient vehicle. The cost per point is more efficient than prime time." Outdoor advertising is also used. For example, the introduction of the peach cooler bore the inscription, "Everything but the pits." The coolers are advertised in trade magazines such as *Impact, Market Watch* and *Nation's Restaurant News*. Newspaper advertising currently isn't planned, but they are testing some minority ads designed by Burrell Advertising.

LNA reports that in 1986, Brown-Forman spent $19.6 million on California Cooler, which includes $16.1 million on network tv; $2.5 million on spot tv; $415,100 on outdoor ads; and $506,100 on cable tv. Radio Expenditure Reports says $2.6 million was spent on spot radio last year.

SUN COUNTRY

Canandaigua Wine Co. openly admits that its advertising budget is more than $40 million. And Ringo Starr, the former Beatle and current spokesman for the new Sun Country Classic, is raking in "well into the seven figures" for his efforts, a salary that isn't included in the $40 million.



"How many of you have heard of Orange County, California?"

Howard Jacobson, Canandaigua's marketing director, says Starr's "highly visible, classic personality" is being pitched to the 25- to 44-year-old age range. The Classic cooler is dry, clear and "upscale." Sun Country's numerous fruit flavors of citrus, orange, tropical fruit, peach and cherry wine coolers — the first of which was introduced in 1984 — have always been geared to those ranging in age from 21 to 35. All Sun Country products, like many cooler brands, are available in two-liter plastic bottles, which have been called a clever innovation for the beach where glass bottles may be prohibited.

The marketing mascot of Sun Country, the bear, has been incorporated into the 30-second Classic commercials. Those may be seen during *St. Elsewhere, Dallas* and *L.A. Law*, while ads for the fruit-flavored beverages have been seen on MTV and *Miami Vice*. The Classic and the fruit flavors are advertised during daytime soap operas. Jacobson notes that 15-second commercials aren't used very often because of limited availability.

Towne, Silverstein & Rotter-designed tv commercials feature various stars sporting bear suits. Actors that range in appeal from Donna Mills to Vincent Price have been used because of the "huge demographic group drinking coolers," Jacobson explains. Charo, also clad in a bear suit, will continue to pitch Sun Country on Spanish tv and radio.

Sun Country coolers also use cable tv, including Turner Broadcasting System and Entertainment and Sports Programing Network. A heavy dose of ads are used during network and cable

SUN COUNTRY
CLEAR & DRY
CLASSIC

Sun Country is paying Ringo Starr a salary in the "seven figures."

sports programing, says Jacobson.

National and local radio 30- and 60-second spots are used, and, depending on the market, commercials feature Grace Jones, the Four Tops or Ringo, of course. Sun Country's ad schedule is heavier during the weekends in resort areas.

Magazine ads, which generally offer sweepstakes, are in *People*, *Rolling Stone* and *Glamour*. Coupons and promotions are advertised in local newspapers in the top 50 markets. Outdoor advertising isn't currently used but is planned for the summer.

Sun Country sweepstakes give away everything from T-shirts to ski weekends. This summer Hawaiian cruises will be given away in a co-op with Hawaiian Tropic tanning lotion. In conjunction with Westwood One Radio Networks, the cooler is also sponsoring concert tours for the rock band Heart and the Judds, a country music band.

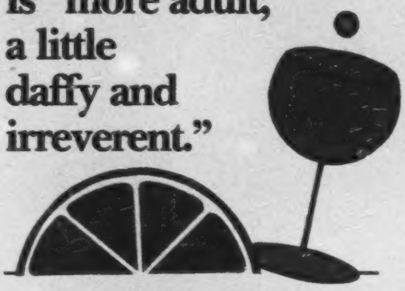
Jacobson said about $25 million to $30 million was spent on advertising in 1986. *Impact* Databank reports that about $29 million was spent on Sun Country's advertising in 1986, but LNA puts the figure at almost $20 million. LNA says about $12.7 million was spent on network tv; $3.6 million on cable tv; $2.6 million on spot tv, $300,900 on network radio; and $292,300 on magazines. Media Records reports that 1986 newspaper expenditures were $15,156. About $315,755 was spent on Sun Country's spot radio advertising, according to Radio Expenditure Reports.

SEAGRAM'S WINE COOLERS

If you think Bruce Willis' image is "more adult, a little daffy, irreverent and clearly more sophisticated," then Seagram has a wine cooler for you.

Willis has been trying to pick up women in bars and even at weddings by crooning about Seagram's Golden Wine Cooler in Ogilvy & Mather-designed tv ads. The commercials currently used are 30- and 15-second spots, while :60's also have been used in the past. They can be seen on *Moonlighting*, of course, and Joan Rivers' *The Late Show* and as well as cable networks such as USA and Turner Broadcasting System.

Seagram's audience is "more adult, a little daffy and irreverent."



Seagram hit the market in late 1984 with its Premium Cooler with citrus flavoring, and the drier-tasting Golden Cooler was introduced a year ago. The premium coolers include three other fruit flavors such as peach and the new apple cranberry and wild berries. The individual line items are pitched more specifically on radio. Ads appear in consumer magazines such as *Life* and trade publications such as *Market Watch*. Free-standing inserts with coupons also appear in local newspapers. According to *Impact* Databank, an estimated $7.50 a case, or $30 million,

DEEP SWIG

"It smells like gangrene starting in a mildewed silo, it tastes like the wrath to come, and when you absorb a deep swig of it you have all the sensations of having swallowed a lighted kerosene lamp."

—a definition of "Corn Licker" by Irvin S. Cobb

This defamation of a native regional potable might offend some Old South traditionalists. But they would be few. Today, in the face of a national trend toward moderation, The South accounts for over half of the country's bourbon consumption, and in the sale of "white goods," this region led all others in the consumption of gin, and accounted for a third of national vodka sales. It is the number one growth market for brandy and cognac. For advertisers, projected trends are as upwardly mobile as the readership of The South's favorite at home magazine.

Southern Living®

Put your money where The South is.

Northern New England's Largest daily Newspaper

211,000 Readers Weekends

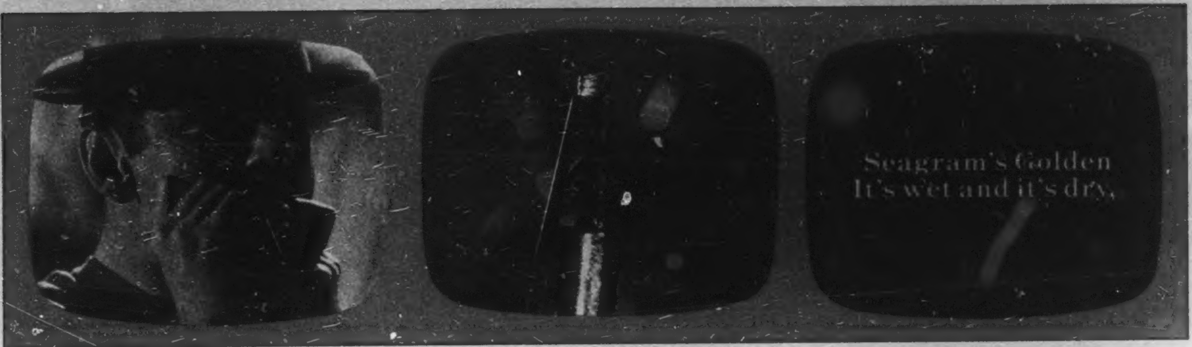
166,000 Readers Daily

Contact your Sawyer-Ferguson-Walker representative or call Roger Choquet at 1-207-942-4881

Bangor Daily News

The Maine Choice

Source: Belden Associates, Dallas, Texas, Oct.-Nov. 1984.


Seagram's Golden
It's wet and it's dry.

Bruce Willis pitches Seagram's Golden Wine Cooler through television.

was pumped into Seagram's Golden Wine Cooler, while the premium coolers were allocated about $10 million in 1986. In 1985, the premium wine coolers received $13.6 million in advertising, *Impact* says.

LNA has three breakouts of advertising expenditures for Seagram's wine coolers in 1986. The first, which is called Seagram's wine coolers, reports that $10.4 million was spent with most of it in network tv. Seagram's "cooler wine cooler" category had a lone expenditure of $232,100 on magazine ads. Seagram's Golden Wine Cooler had a total of $16.3 million in advertising, $13.9 million of which was on network tv and the rest in magazines, network radio, spot and cable tv. Media Records says newspaper expenditures in 1986 amounted to $594,737. Radio Expenditure Reports says $181,905 was spent on spot radio.

Seagram coolers also have been a sponsor of tennis tournaments and the U.S. Open Bowling Tournament. This year the company will co-sponsor with Starstream, which discovered Bon Jovi and Twisted Sister, "Seagram's Cooler Talent Search," a search for the "best rock and roll band" in America. The search will be promoted in conjunction with radio stations, and concerts will be conducted in 60 markets.

CALVIN COOLER

"Ain't nothing cooler than a Calvin" may be nothing more than a memory since Joseph Victori Wines Inc., of Brooklyn, N.Y., is reviewing its ad pitch. The new ad campaign, designed by Warwick Advertising and targeted at adults 18 to 34 years old, is expected to begin in the middle of this month.

Calvin Cooler is different than its formidable competitors because it spent less than $20 million last year and probably won't increase its budget much more in 1987, says Jose Fernandez, vice president, sales and marketing. It also spends time homing in on its Northeastern market. Fernandez claims Calvin is king of coolers in New York. The company also believes that coolers truly are a seasonal product so Calvin's advertising is built around the peak season of May through September, "when the fish are running."

And where the top coolers are seen mostly on network tv, Calvin's ad breakdown is about 50% radio and 40% tv, with 95% of that money going to spot. The remaining 10% of the media plan is mostly in outdoor. Small amounts of cable and network radio are used. Tv spots are 30 seconds, and radio spots are 60 seconds. Local newspapers may run coupon ads in the top 10 markets nationwide. Calvin also uses some mail-in rebates and discount couponing.

There are six Calvin Coolers with a malt base and nine wine-based coolers

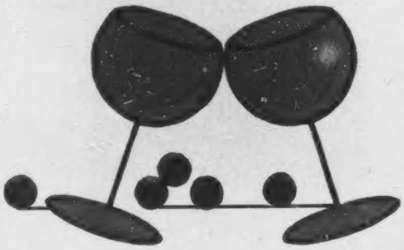
"How many of you are aware that Orange County, California is the nation's 17th largest market and the 10th highest in medium household income?"

S&MM, 1986 Survey of Buying Power

that include citrus, orange, raspberry, passion (made up of passion and tropical fruits), grape, sea breeze (a cranberry flavor), piña coconut, chablis cooler and peach. A new flavor has been coming out about every six months, says Fernandez.

Although Joseph Victori Wines Inc. claims it spends less than $20 million, *Impact* Databank estimates about $10 million in 1986 advertising. LNA tracked a mere $1.7 million in expenditures, most of which was in spot tv. Media Records says $27,099 was spent on newspaper ads in 1986. About $1.7 million was spent on spot radio, according to Radio Expenditure Reports.

Calvin Cooler's ads may be heard more than seen with more radio used than tv.



20/20 WINE COOLER

The Wine Group produced the first orange juice cooler in 1984, "but then everybody made it, so we 'deemphasized' it," says company president Arthur Ciocca.

The 20/20 Wine Coolers appeal to 21 year olds on up to the "very old, believe it or not," says Ciocca. 20/20 Wine Cooler's flavors now include strawberry, peach and cherry. The ad pitch from San Francisco-based Cole & Weber is "Got the thirsties? Get the 20's." A new segment is called the "All-American Wine Coolers." The marketing gimmick is in patriotic flavors that match Old Glory's colors. The flavors are red raspberry, white chenin blanc and blueberry, and even the packaging for the three flavors is red, white and blue. Ciocca explains that the line was introduced in conjunction with the 200th anniversary of the signing of the Constitution. "And," notes Ciocca, "there are several really important holidays that fall in the middle of the cooler season." He maintains the beverage is a seasonal product.

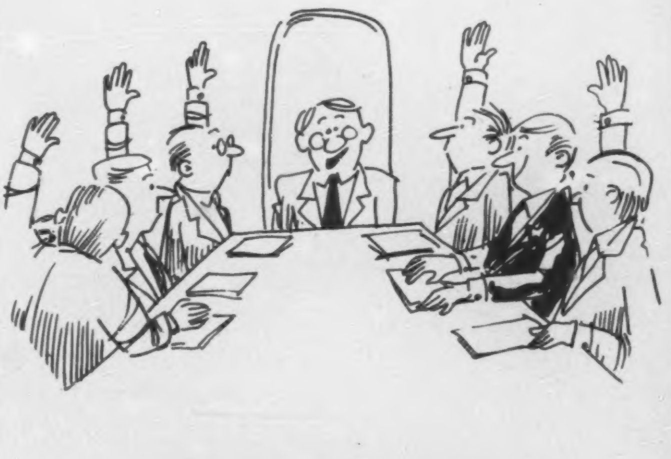
Although 20/20, a line extension of the Wine Group's fortified MD 20/20 wine, is nationally distributed, Ciocca points to the strength of wholesalers for its popularity in the West. Spot tv ads of 10 and 30 seconds are used. Magazines or newspaper ads are rarely bought, but Ciocca likes to get his products in supermarket advertisements. The price-competitive cooler has been known to sell a four-pack of 14.4 ounce bottles for the same price as a 12-ounce four-pack.

According to *Impact* Databank, 20/20 Wine Cooler dropped to an estimated 2.4% share of the market in 1986 from 3.7% a year earlier. Case depletions, however, increased to an estimated 1,800 in 1986 from 1,600 in 1985.

Leading National Advertisers reports that about $637,200 was spent on spot advertising in 1986 and $14,200 on cable tv ads. Radio Expenditure Reports says $4,193 was spent on spot radio. Media Records does not report any newspaper expenditures for 20/20 Wine Coolers.

The Wine Group also has been marketing a White Zinfandel cooler since May 1986, which was recently joined by a Cabernet Sauvignon cooler under its Franzia cooler line.

20/20 salutes the Constitution's 200th anniversary.



"Who amongst us is in favor of adding Orange County's leading newspapers, The Orange County Register MetroGroup, to our media buy?"

Dewey Stevens goes after dieters by slashing one-third of its calories for "two-thirds more fun."

DEWEY STEVENS

Dewey Stevens Premium Light, the low-cal entry in the wine cooler arena, advertises on shows like *Late Night with David Letterman* and even forces the viewer to watch one of the show's regulars during the commercials. Larry "Bud" Melman pitches the product as does the old *Saturday Night Live*'s Father Guido Sarducci character.

Mitch Meyers, group marketing director for Anheuser-Busch Beverage Group, says the product gets "a lot of mileage" out of its commercials because the 15-second spots aren't abbreviated versions of the 30-second spots. Different messages and jokes are used, she says.

The 135-calorie beverage is being pitched as "One-third less calories, two-thirds more fun," as coined by D'Arcy Masius Benton & Bowles, St. Louis, which became Dewey's agency last fall. The Bloom Agency, Dallas, developed the original "Dewey, you do me right" theme when the product was introduced last summer. The tv commercials featured women opening their own business, working out at a gym and also playing softball.

Dewey Stevens had been targeting females, but it was discovered that they aren't the only ones interested in calories, explains Meyers.

In addition to Letterman's show and the current *Saturday Night Live*, Dewey's ads also can be seen on *Miami Vice, L.A. Law, Cheers* and *Friday Nite Videos*. There are spot and cable tv ads as well as network radio advertising. Magazines aren't used, but there is local co-op advertising with print and radio in conjunction with wholesalers.

Father Guido Sarducci makes a pitch for Dewey Stevens.

Consumer promotions include framed Dewey Stevens mirrors and "Dewey's Double Take," a special summer promotion with two four-packs for sale at discount prices. The product is skewed toward the summer season, although some Thanksgiving and Christmas advertising is planned.

Baybry's, a champagne cooler, had been tested marketed by Anheuser-Busch last year, but tests stopped in January. Meyers says consumers thought the price at $4 a four-pack to be "prohibitive," although "the people who tried it loved it." Dewey Stevens goes for $2.89 to $2.99 a four-pack.

Impact Databank estimates that about $20 million was spent on advertising or $13.33 a case on a nine-liter case volume of 1.5 million cases. LNA says $14.4 million was spent on network tv; about $2 million on spot radio and lesser amounts on magazines, spot and cable tv and outdoor ads. Media Records says $1.1 million was spent on newspaper ads in 1986. And Radio Expenditure Reports says about $1.4 million was spent on spot radio. ■

"Why not?"

"It's been on our media schedule for years."

The Orange County Register is now the nation's 3rd largest newspaper for total full-run advertising. (Media Records, 1986)

THE ORANGE COUNTY Register METROGROUP

The leading medium in Southern California's richest market
Represented by CWO&O

ECONOMIC EYE

INDEX FANS, BEWARE

Before working with this month's Media Cost Index, please note that the base year for all media has been updated to 1985. The Index has been adjusted back to June 1986.

Also, newspaper rates are now based on costs per column inch for 784 newspapers, weighted to represent the universe.

MAGAZINE AD SCORECARD	Ad Pages Mar. 1987	% change from Mar. 1986	Dollars spent (000)	% change from Mar. 1986
1. Skin care, Creams, Lotions and Oils	217.33	+7.23%	$ 7,331.3	+30.89%
2. Lip and Eye Beauty Products	133.02	+34.13	4,733.3	+35.31
3. Scents and Fragrances	142.85	−22.49	4,055.7	+19.29
4. Facial Makeup Products	100.59	+73.73	3,257.6	+46.09
5. Prepared Dinners and Entrees (including Pizza)	47.92	−15.25	2,670.4	−23.44
6. Liquor	260.78	−16.80	11,628.2	−13.93
7. Cigarettes	609.22	−15.41	31,334.7	−21.48
8. Soaps and Detergents	41.73	−14.59	2,466.5	−17.49
9. Passenger Cars, Domestic	518.49	+13.60	27,662.0	+26.66
10. Passenger Cars, Imported	500.39	+16.53	24,676.4	+10.27

Source: Publishers Information Bureau as prepared by Leading National Advertisers

MEDIA COST INDEX

1985 = 100	← 1986													→	1987	
	June	% change	July	% change	Aug.	% change	Sept.	% change	Oct.	% change	Nov.	% change	Dec.	% change	Jan.	% change
Network TV																
Daytime	95	−5	102	+2	95	−5	102	+2	103	+3	98	−2	85	−15	106	+0
Nighttime	109	+9	107	+7	108	+8	107	+7	104	+4	107	+7	109	+9	92	−8
Spot TV																
Prime time	120	+20	126	+26	121	+21	105	+5	119	+19	115	+15	116	+16	–	–
Daytime	105	+5	113	+13	109	+9	99	−1	109	+9	111	+11	105	+5	–	–
Network radio	115	+15	104	+4	105	+5	104	+4	115	+15	106	+6	101	+1	139	[illegible]
Spot radio	←	→	←	—	98	−2	—	→	←	—	103	+3	—	→	–	–
Consumer magazines	106	+6	105	+5	105	+5	106	+6	106	+6	106	+6	107	+7	109	+4
Natl. Sunday mags	96	−4	96	−4	105	+5	105	+5	94	−6	94	−6	94	−6	103	+10
Business publications	106	+6	106	+6	106	+6	106	+6	106	+6	107	+7	107	+7	111	+5
Newspapers	108	+8	108	+8	108	+8	108	+8	108	+8	109	+9	109	+9	116	+8
Outdoor	107	+7	107	+7	107	+7	111	+11	106	+6	106	+6	106	+6	111	[illegible]

Notes: Percentage shown is relative change from the same month/period the year before.

1985 = 100

Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.

- C2950-3
6/8/87

REPORT:
NEWSPAPER
BRAND LEADERS

MARKETING & MEDIA
DECISIONS

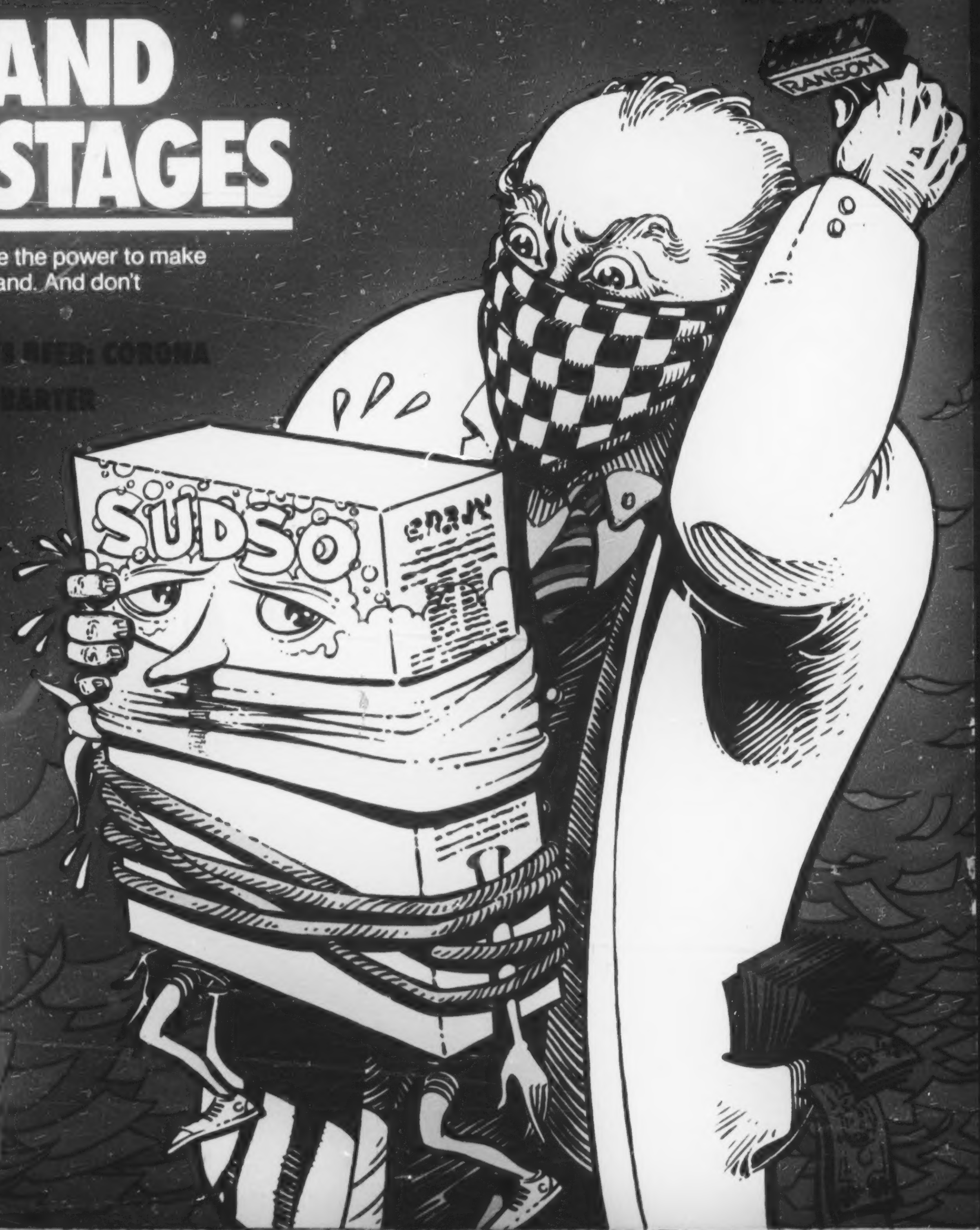
JUNE 1987 • $4.00

BRAND HOSTAGES

Retailers have the power to make or break a brand. And don't they know it.

THIS YEAR'S BEER: CORONA

IS BIGGER BARTER BETTER?



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711 00161861 41 93
GREG CHRIS
CONGRESSIONAL INF SVC
4520 EAST-WEST HWY #800
BETHESDA MD 20814 CIR

MARKETING & MEDIA DECISIONS

COVER STORY

BRAND HOSTAGES 38

For years, marketers quietly earmarked bigger and bigger dollars from their budgets to insure shelf space for their brands. They knew the formula: To reach the customer, take care of the retailer. These same marketers now say the practice has gotten out of control. What's more, they're willing to go on record about it.

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BARTER GETS IT TOGETHER 46

Consolidation has created International Advertising Sales, the giant joint venture among syndicators Orbis Communications, Coca-Cola Telecommunications, Columbia/Embassy, Paramount Domestic Television and Merv Griffen Enterprises. What remains to be seen is whether the move will create any real advantages in the marketplace.

THE GREAT FREEZE OUT 54

Those fancy frozen foods may be showing the first signs of a thaw in America's upscale tastes. After a booming debut, they find themselves loosing ground to their more budget-conscious competition.

THIS YEAR'S BEER: CORONA 95

Against all odds, this super-premium Mexican import has zoomed to number two in the import field. It isn't even national — yet.

TAKING DIRECT AIM 100

The catalog industry is still appraising the home shopping channels' effect on their business. Booster or buster? Opinions are divided, but some catalogers are turning to the tube to cover their bases.

BRAND REPORT 143: MEN'S FRAGRANCES 125

All the strength is in the scents in this flat category. No wonder marketers are widening their targets.

SPECIAL REPORT

THE 1986 NEWSPAPER BRAND LEADERS 61

Led by nationally minded newspaper execs, the medium is taking an aggressive stance to become more appealing to major marketers. Will it pay off? Let's hope so — 1986 was a very weak year for national advertising in newspapers. In our exclusive report, *Decisions*, with data supplied by Media Records, looks back on '86 and reveals the top 100 national advertisers in the medium (page 64). Then, beginning on page 67, the top three brands in each of 50 different categories are listed, as well as close-up analyses of four major categories: tobacco, automobiles, airlines and alcoholic beverages.

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Russ Klein takes his youth to 7Up, *Venture*'s founders Joe Giarraputo and Carl Burgen think global and Jack Wakshlag helps CBS give the people what they want.

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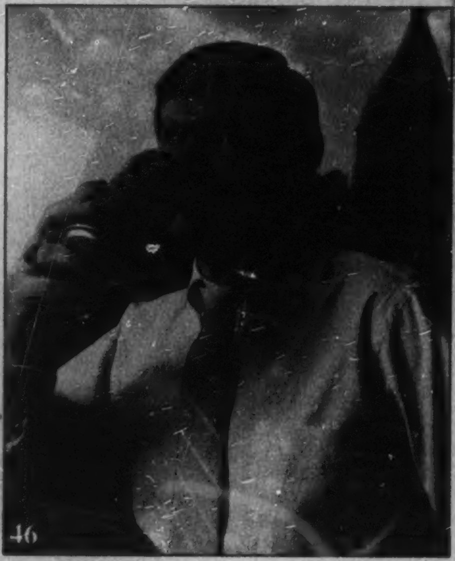
Stronger women's market presence is the New York Times Magazine Group's goal in signing *Child*, hailing *Taxi*.

DEBUT 24

Presenting, *The Next President*. David Frost, in conjunction with *U.S. News & World Report*, will host a multi-media package of interviews with front-runners in the 1988 presidential race.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Cable, meanwhile, makes a fashion statement with The Fashion Channel.

DIRECT MARKETING 26

The top 25 direct marketing agencies are examined. In New York, a Wisconsin-based financial house takes on the big boys via direct mail.

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Some food (and spirits) for thought on the Constitution's bicentennial, and ad agency L3 supplies a rare look at Asian-American media and product-purchasing habits.

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The 3-D technology of holograms is showing some down-to-earth advantages for marketers. So far, they've shown up on paperbacks and cereal boxes. Next up, a holographic ad?

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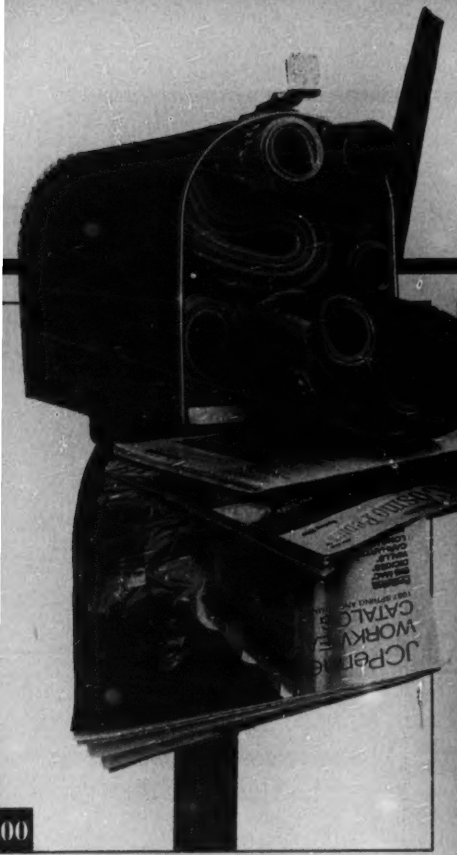
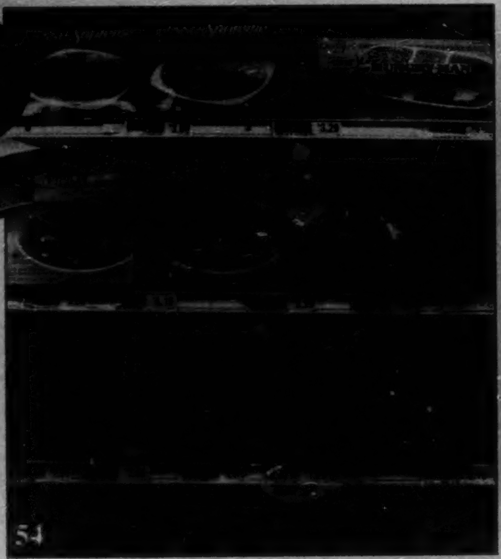
It's back to basics for Lifetime, and the move has left them with a healthy glow. The Discovery Channel sets out on its latest challenge as it builds an ad sales operation.

June 1987, Vol. 22, No. 6

Cover illustration by Jery





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Kraft and agency Leo Burnett have taken MRI's magazine page exposure numbers and integrated them into their magazine plans.

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Kids viewing is down, and John Claster, president of Claster Television, finds there are "no umbrella answers" to this phenomenon.

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The advantages and the execution of global marketing strategies are outlined, while readers reveal their worldly views.

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The cries for reform are heard high on the Hill as the airline industry meets the wrath of disgruntled fliers.

SALES PROMOTION 153

Here's Part I of Russ Bowman's annual report for 1986 on the sales promotion industry. What a year!

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Time marches on, and so does the Media Cost Index. Also, a snapshot of category ad investments in magazines.

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John O'Shaughnessy of Columbia focuses on wants and beliefs as keys to the gentle art of persuasion.

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Whatever you may think of magazine rate negotiation, it suggests some advantages in consolidating the buying function at agencies.

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R.D. Percy's "passive" system offers some intriguing possibilities for the future — a method of validation and a measure of audience dynamics.

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The spot buying process would benefit from a more conscientious performance by the stations.

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Long-form programing on radio can work small wonders to round out a media plan.

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Consider the coupon. Most marketers are, and it calls for some finesse to properly plan for it. Here's the media person's perspective.

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DIRECT MARKETING

by Rebecca Fannin

TO RANK AND FILE

While the annual ranking of direct response agencies released by the Direct Marketing Association reveals few moves at the top, things heat up on the lower rungs.

Notable changes include the meteoric growth registered by Lowe Marschalk Direct Marketing, whose billings rose from $13 million in 1985 to $40 million last year, pushing its ranking from 23rd to 12th. Similar growth was experienced at Hemmings, Birkholm & Grizzard. In 1985, the agency had billings of $6.5 million and was in 35th place. Last year's $26 million in billings catapulted it to 18th among direct response agencies.

Among the top-ranked shops, Wunderman, Ricotta & Kline maintains its number-one position with $224 million in 1986 billings. It is followed by second-placed Ogilvy & Mather, with $207 million, which was also last year's second-largest agency. Marcoa DR Group, Inc. retains its third-place stance with $110 million in billings.

Farther down the list, Grey Direct edges to fourth place, after a fifth-place finish last year. Its billings rose from $82 million in 1985 to $94 million in 1986, allowing Grey to unseat Rapp & Collins Direct Response Group.

Rankings are compiled by the DMA using information provided by its research department. The accompanying chart shows the 1986 results of the top 25 agencies, which report fees and commissions only.

BITING THE APPLE

B. C. Ziegler & Company, a Wisconsin-based retirement investment specialist, is going head-to-head with its giant New York competitors with a direct mail test designed to reach out beyond its customer profile.

Created by Cramer-Krasselt/Direct, the campaign, which includes the first mailings that the investment company has done beyond its customer file, offers a two-color, 24-page handbook called "Retirement Planning Made Simple." A total of 75,000 pieces are being mailed in two separate drops to adults ages 45 to 55 where Ziegler has offices.

"We anticipate a good return, as much as 3-to-4% requesting the handbook," says Phillip R. May, executive vice president and general manager of Cramer-Krasselt/Direct. "Those who receive it will continue to be sent follow-up mailings on specific products, such as mutual funds and tax-deferred bonds."

The first mailing, in a 5-by-7-inch envelope, includes a two-page cover letter from Ziegler's chairman, a black-and-white brochure offering a free retirement planning handbook and a coupon designed to be mailed to receive the material.

A second, less elaborate mailing uses a standard-size envelope. It also features a personalized cover letter emphasizing the firm's advantages over the "giant New York investment companies." Interested parties write in their phone numbers and mail it to the company for the retirement planning handbook.

THE TOP 25 DIRECT MARKETING AGENCIES

	Billings (millions)	
	1986	1985
[illegible]	224.5	175.7
2. Ogilvy & Mather Direct	207.4	172.0
[illegible]	110.0	101.0
4. Grey Direct International	94.0	81.8
[illegible]	81.0	70.3
6. Chapman Stone & Adler, Inc.	80.4	80.9
[illegible]	80.1	83.5
8. FCB Direct	78.4	60.6
[illegible]	63.1	42.5
10. McCann Direct	42.0	24.1
[illegible]	41.0	32.5
12. Lowe Marschalk Direct Marketing	40.9	13.0
[illegible]	40.0	32.9
14. Ayer Direct	37.0	25.0
[illegible]	36.7	26.5
16. GSP Marketing Services	34.4	27.7
[illegible]	31.0	30.5
18. Hemmings, Birkholm & Grizzard	26.0	6.5
[illegible]	26.2	24.5
20. The Reich Group	25.3	15.3
[illegible]	24.3	20.1
22. Fairfax Advertising, Inc.	24.2	40.0
[illegible]	21.7	25.5
24. Cramer-Krasselt/Direct	20.7	6.2
[illegible]	18.8	12.2

Source: Direct Marketing Association

SPECIAL REPORT

THE 1986 NEWSPAPER BRAND LEADERS

by Fred Pfaff

Statistics editor:
Patrick Kelly

"Necessity is the mother of invention." How well that proverb fits the state of national advertising in newspapers. Crises among basic ad categories have newspapers listening harder to age-old advertiser complaints, identifying new prospect categories and straining like never before to provide incentives to big-name national non-advertisers. The promise of change is as critically important as the flat ad tallies.

First, some history. Total ad investments in newspapers have grown every year, but newspapers' share of all national advertising dollars — now just over 6% — is less than half what it was when millions of living rooms were starting to soak up the glow of tv sets around 1960.

The reason? Many national advertisers simply haven't been anxious to employ a high out-of-pocket-cost, high-CPM medium that they feel treats them as secondary customers, favoring regular local-retail advertisers with lower rates, sharper volume discounts and guaranteed positions. They're just as loathe to juggle a maze of contracts and rate rules that swallow up as much time as planning itself.

Hopes ran high when national spending rose 8.8% in 1985. But last year, according to the Newspaper Advertising Bureau, advertisers spent $3,375,556,000 in newspapers — only 0.7% more than in 1985. Such stalwart advertisers as tobacco and liquor marketers, faced with radical changes in old American habits, hefty taxes and/or hostile legislation, cut back heavily on their newspaper spending: tobacco by 36.8%, liquor by 10.9%, according to Media Records. (See close-ups that follow.)

In private, no doubt, some publishers still put the blame for lost dollars on big-budget advertisers and their agencies. For ego satisfaction or commission, reach or the dazzle of sound and motion in full color, they too often put their first foot forward into television. But as a medium, newspapers now recognize their share of the blame and they are taking to heart advertisers' longtime complaints.

Y&R's Scullin and Miller designed a packaged-goods discount plan.

The standardization that started in 1984 with SAU's — standard advertising units, measured in inches, that replaced over 400 separate measurements — is blossoming into a second look by top executives at nearly every hurdle the medium faces. The Future of Advertising Committee, 10 big-name task forces created by the NAB and the American Newspaper Publishers Association (ANPA) in May 1985, has already published a report on readership and convinced papers across the country to consider an array of standard ad positions (island and vertical column positions, for instance).

Processing headaches are also coming under the FOA microscope. The committee has recommended that all newspapers adopt an FOA-developed standardized invoice, replacing several hundred individualized forms. It's recommending standardized terminology, lead-time requirements, contract forms and tv logs. And June marks the debut of a color guidebook.

More critical for advertisers is the bottom line. In January, the FOA committee recommended standard price break points for volume discounts at the equivalent of one-quarter, one-half, one, two, four, six, 10, 13, 26, 52, 75, 100, 150 and 200 pages. While a task force on repositioning and advertising searches out a tagline for newspapers' marketing efforts, sales teams composed of NAB personnel and top salespeople from the *New York Times*, *Los Angeles Times*, *Chicago Tribune*, *Washington Post* and *Boston Globe* are heading out to pitch advertisers in target categories, including beer and over-the-counter drugs, on ad opportunities cleared with likely candidate papers. Confidence in cracking new categories runs high enough that NAB president Craig Standen predicts a 5% gain in national advertising this year.

To get more business, newspapers know they have to make their price as attractive as their pitch. The FOA is urging papers to offer discounts for same-size ads repeated within given periods and introductory discounts for advertising categories from which they're drawing little or no business.

In many cases, an introductory discount would effectively eliminate the rate differential — now approaching 100% in most major market papers that get the bulk of national dollars. As Jerome Tilis, president of the *Detroit Free Press* and vice president, marketing for Knight-Ridder Newspapers Inc., told the ANPA 100th-anniversary convention last month, "The biggest reason [the rate differential] is here today is that it's always been there. And that's not enough to satisfy the national advertiser."

Newspapers are also getting a big

YOU CAN IN...
COLUMBUS, OHIO

push from the outside. In January, Young & Rubicam vice president, director of out-of-home media services John Miller and senior vice president, director of print and new electronic media Leo Scullin, worked out with several papers a special rate for packaged-goods advertisers (excluding tobacco and liquor). Y&R hopes to get such advertisers to turn away from low-CPM free-standing inserts and resume their ROP schedules, which build a brand's image and bring an agency commission. Over 200 papers have already agreed to open the rate — essentially the appropriate retail rate plus 15% commission — to any such advertiser who commits to at least a quarter-page, non-coupon ad 13 or more times.

"Now we have a test as to whether a favorable price indeed will cause action," says NAB's Standen. The unspoken suggestion, whispered by many in the selling community, is that if papers don't see significant new business gains within the next year or so, some may retrench a bit in their stances toward the national advertiser. "It's put up or shut up time," says one newspaper veteran. "National advertisers have been jawboning us without doing anything to meet us in the middle ground."

"That's the same old thing," counters Frank Hajek, vice president, associate media director at DFS Dorland. "The business isn't going to come in over the transom just because they've made changes."

Response to the Y&R proposal has led some industry executives to believe that within two years newspapers will move firmly into either category pricing or a two-tiered rate structure that differentiates between the frequent and the occasional advertiser. A number of advertisers, particularly in the airline category, are pressuring newspapers to offer them concessions similar to the packaged-goods rate. And four Southwestern client papers of Branham Inc. — the *San Antonio Express, Albuquerque Journal-Tribune, Tulsa World & Tribune* and *Louisiana State Times & Morning Advocate* — have combined to offer a liquor rate (essentially retail plus 15-to-20% commission) to advertisers committing to more than two pages worth of ads of any nature.

Newspaper rep firms aren't squawking. Much maligned by agency buyers and questioned by publishers of late (see "Surviving the Satellites," February 1987, pg. 42), rep firms have turned the rate issue into a chance to prove their value. Rep firms' closed-door efforts were important in getting many papers to agree to the Y&R rate; the Newspaper Advertising Sales Association, largely composed of rep firm executives, is creating a data base of the offered rates; and rep firms are pitching the non-Y&R food clients on packaged-goods rate insertions.

Newspapers may have more than new packaged-goods ROP to look forward to as a result of AD/SAT, the satellite ad transmission system and message center that went into operation January 5 ("Clear Signals for AD/SAT," February 1987, pg. 35). Such retailers as Lord & Taylor, Bonwit Teller and Macy's have made daily use of the system, and late last month NBC became the first advertiser to use the system for a full run of the 12 papers now on line. Transmission on a big scale can begin when AD/SAT brings 103 papers on line in September.

Time-saving transmissions and pocket-saving discount structures are critical first steps. As publishers know, the changing American business and social scenes have laid newspapers' future in national advertising at the feet of unfamiliar categories. As William Dowse, vice president of advertising at Eastern Airlines, puts it, "If I were in the newspaper business, I'd be trying hard to open up new categories of business. Little stays the same for long these days."

NUMBERS
speak louder than words

- Sunday World-Herald circulation for March 1987 was up more than **6,000** copies over March 1986 setting a monthly record of **291,497** copies.
- Daily World-Herald circulation for March 1987 was up more than **700** copies over 1986 reaching **222,543.**
- The Omaha World-Herald ranks **6th** nationally on Sunday in circulation penetration of metropolitan areas with over **150,000** households.
- The Omaha World-Herald is recognized as the **#2** test market among the nation's top test markets by American Demographics.

Omaha World-Herald
Represented Nationally by CWO&O. For more information call George Kaplan,
National Sales Manager, 402-444-1000 ext. 3406.

TOP 100 NATIONAL NEWSPAPER ADVERTISERS — 1986

Rank	1986 Investments	1985 Investments
1. General Motors Corp.	$146,430,000	$140,979,000
2. Ford Motor Co.	76,136,000	77,295,000
3. Texas Air Corp.	63,417,000	15,075,000
4. Philip Morris Cos.	57,589,000	78,013,000
5. RJR/Nabisco	50,347,000	73,321,000
6. Chrysler Corp.	42,203,000	42,000,000
7. American Telephone & Telegraph Co.	31,106,000	57,210,000
8. Trans World Airlines, Inc.	29,329,000	20,870,000
9. General Electric Co.	26,986,000	10,332,000
10. Allegis (UAL, Hertz)	26,900,000	19,987,000
11. AMR Corp. (American Airlines)	25,194,000	19,534,000
12. Mercedes-Benz of North America	23,340,000	18,008,000
13. Toyota Motor Sales Co.	22,878,000	20,761,000
14. Delta Air Lines, Inc.	22,309,000	17,116,000
15. NWA Inc. (Northwest/Republic/ Northwest Orient)	22,219,000	25,126,000
16. Honda Motor Co., Ltd.	21,087,000	10,331,000
17. CBS Inc.	20,116,000	20,936,000
18. Pan-American World Airways, Inc.	18,784,000	21,218,000
19. NYNEX Corp.	18,614,000	15,133,000
20. GTE Corp.	18,140,000	13,665,000
21. Nissan Motor Co.	17,627,000	16,504,000
22. International Business Machines	16,646,000	30,610,000
23. Volkswagen AG	15,914,000	10,966,000
24. Southwest Airlines Co.	14,153,000	5,953,000
25. Time, Inc.	13,951,000	13,592,000
26. Liberty Travel, Inc.	13,871,000	10,902,000
27. American Express Co.	13,498,000	14,864,000
28. British Airways	12,019,000	3,703,000
29. Anheuser-Busch Cos.	11,744,000	5,611,000
30. U.S. Government	11,447,000	15,826,000
31. Piedmont Aviation, Inc.	11,160,000	6,813,000
32. B.M.W. of North America Inc.	10,924,000	7,594,000
33. Hyundai Motor America	10,396,000	—
34. American Brands, Inc.	10,260,000	4,050,000
35. Capital Cities/ABC, Inc.	9,989,000	18,168,000
36. May Department Stores Co.	9,856,000	5,609,000
37. American Motors Corp.	9,824,000	9,902,000
38. Norwegian Caribbean Lines	9,627,000	11,948,000
39. Jaguar Cars Inc.	9,089,000	8,810,000
40. Pacific Telesis Group	8,895,000	7,706,000
41. PepsiCo, Inc.	8,806,000	5,926,000
42. Carnival Cruise Lines	8,805,000	6,506,000
43. USAIR Group, Inc.	8,189,000	6,471,000
44. Loews Corp.	8,114,000	13,815,000
45. Apple Computer, Inc.	8,070,000	8,139,000
46. Hyatt Corp.	7,980,000	5,990,000
47. United Technologies Corp.	7,945,000	8,807,000
48. Mobil Corp.	7,912,000	7,668,000
49. Club Med, Inc.	7,825,000	5,865,000
50. Epson America, Inc.	7,810,000	5,975,000
51. Ameritech	$7,532,000	$10,829,000
52. Isuzu Ltd.	7,339,000	3,175,000
53. Franklin Mint Corp.	7,298,000	6,960,000
54. Southwestern Bell Corp.	7,259,000	7,286,000
55. Royal Caribbean Cruise Line	7,175,000	6,591,000
56. Peugeot Motors of America	7,070,000	9,799,000
57. Pleasant Hawaiian Holidays	6,847,000	6,901,000
58. Seagram Company Ltd.	6,417,000	7,054,000
59. Bellsouth Corp.	6,370,000	6,820,000
60. Bell Atlantic Corp.	6,232,000	4,369,000
61. Mazda Motors of America (Central)	6,175,000	5,036,000
62. Xerox Corp.	5,904,000	11,351,000
63. Frost Co.	5,895,000	4,962,000
64. Volvo North America Corp.	5,768,000	8,970,000
65. Mitsubishi Motor Corp.	5,509,000	5,362,000
66. Brown-Forman Corp.	5,469,000	8,187,000
67. Cunard Line Ltd.	5,467,000	8,791,000
68. Coca-Cola Co.	5,227,000	6,941,000
69. Subaru of America, Inc.	5,211,000	4,321,000
70. Greyhound Corp.	5,196,000	3,971,000
71. B.A.T. Industries p.l.c.	5,139,000	28,425,000
72. MLT Vacations	4,867,000	2,138,000
73. Transamerica Corp.	4,701,000	4,040,000
74. Westray Capital Corp. (Avis)	4,596,000	5,178,000
75. Hearst Corp.	4,492,000	5,446,000
76. Costa Cruises	4,388,000	2,784,000
77. Hattori Seiko Co.	4,282,000	5,638,000
78. Maytag Co.	4,258,000	4,481,000
79. Saab-Scania of America	4,221,000	4,950,000
80. Midway Airlines, Inc.	4,200,000	5,529,000
81. Alamo Rent-A-Car, Inc.	4,171,000	4,195,000
82. Blue Shield of California	4,149,000	4,792,000
83. Whirlpool Corp.	4,140,000	1,750,000
84. Procter & Gamble Co.	4,030,000	7,345,000
85. American Cellular Network Corp.	4,010,000	1,371,000
86. Horn & Hardart Co.	3,898,000	1,749,000
87. Grand Metropolitan p.l.c.	3,850,000	7,101,000
88. Walt Disney Co.	3,835,000	2,605,000
89. UNISYS Corp.	3,825,000	736,000
90. Bertelsmann Publishing Group (Doubleday)	3,755,000	4,342,000
91. Carlson Companies, Inc.	3,680,000	5,123,000
92. Sitmar Cruises	3,672,000	5,158,000
93. Estee Lauder, Inc.	3,658,000	3,447,000
94. Armstrong World Industries	3,657,000	4,218,000
95. Beatrice Cos. (minus Avis)	3,652,000	5,595,000
96. Household International, Inc. (National Car Rental)	3,633,000	3,048,000
97. Toro Co.	3,613,000	3,502,000
98. Exxon Corp.	3,491,000	2,742,000
99. Commodore Intl. Ltd.	3,471,000	3,590,000
100. Carter Hawley Hale Stores, Inc.	3,458,000	4,420,000
Total top 100 newspaper advertisers	**$1,331,619,000**	

Source: Media Records

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Air conditioning					
Carrier	$ 2,054,000	$ 1,712,000	$ 2,697,000	$ 1,371,000	$ 1,478,000
Friedrich	1,574,000	1,049,000	536,000	748,000	476,000
Trane	901,000	501,000	334,000	–	–
Airlines – Domestic carriers (foreign and domestic destinations)					
TWA	29,329,000	20,661,000	21,424,000	21,852,000	19,776,000
Eastern	28,996,000	24,838,000	18,611,000	22,461,000	21,625,000
American	22,650,000	19,293,000	13,181,000	12,059,000	18,412,000
Airlines – Foreign carriers					
British	12,019,000	3,703,000	3,662,000	3,075,000	3,423,000
Aero Mexico	2,758,000	2,421,000	2,999,000	2,010,000	645,000
Lufthansa	2,588,015	651,000	327,000	832,524	537,000
Amusements					
Disney	3,506,000	2,225,000	866,000	977,000	552,000
Soaring Adventures	1,189,000	287,000	15,000	–	–
Expo '86/Vancouver	566,000	–	–	–	–
Auto lease-rental					
Hertz	7,812,000	8,215,000	7,524,000	8,429,000	4,682,000
Avis	4,568,000	5,178,000	5,053,000	3,655,000	2,245,000
Budget	4,517,000	3,900,000	3,474,000	1,949,000	801,000
Automobiles – Domestic					
Ford	50,999,000	43,616,000	31,194,000	28,967,000	28,015,000
Chevrolet	49,417,000	46,641,000	35,305,000	21,992,000	28,754,000
Cadillac	27,644,000	31,209,000	21,740,000	22,780,000	16,752,000
Automobiles – Imported					
Mercedes-Benz	23,337,000	17,865,000	6,495,000	6,586,000	3,786,000
Toyota	22,866,000	17,915,000	10,736,000	11,095,000	14,050,000
Nissan	13,932,000	13,135,000	9,531,000*	6,072,000*	6,788,000*
(* Datsun/Nissan combined)					
Beers – Domestic (regular only)					
Miller	5,659,000	1,925,000	1,279,000	1,556,000	490,000
Budweiser	5,360,000	2,836,000	2,003,000	2,141,000	1,078,000
Coors	1,232,000	1,467,000	539,000	990,000	1,037,000
Beers – Imported					
Konig Pilsener	174,000	–	–	–	–
Labatts	116,000	203,000	408,000	–	65,000
Heineken	116,000	221,000	150,000	15,000	40,000
Bus lines					
Greyhound	5,117,000	2,615,000	3,193,000	5,824,000	1,209,000
Metropolitan Transit	744,000	757,000	235,000	98,000	229,000
Dart	630,000	212,000	–	–	–

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Cable TV					
Home Box Office	4,738,000	4,023,000	2,747,000	1,460,000	6,305,000
Cablevision	2,719,000	3,066,000	4,406,000	2,781,000	1,199,000
ESPN	2,107,000	2,639,000	3,675,000	2,541,000	2,394,000
Cameras-photo supplies					
Kodak	3,150,000	2,578,000	3,595,000	5,105,000	3,650,000
Polaroid	1,760,000	538,000	1,253,000	1,923,000	1,388,000
Sony	1,164,000	968,000	595,000	733,000	–
Cereals					
Ralston Purina	980,000	487,000	372,000	1,105,000	26,000
Quaker	649,000	466,000	412,000	215,000	316,000
General Mills	183,000	489,000	613,000	1,746,000	420,000

TOBACCO: END OF AN ERA

It was logical given the course of events rattling the tobacco industry, but newspaper rep firm executives were nonetheless stunned when word spread last fall that R.J. Reynolds Tobacco Co. was considering cutting out all ROP advertising in daily newspapers. Instead, went the reports, they'd rely on coupon ads in free-standing inserts and Sunday magazines to supplement consumer magazine, outdoor and expanded promotional efforts.

As it turns out, the company is advertising in daily newspapers in 1987, but on a far smaller scale. Primary spending, reps report, is coming in markets where outdoor advertising — which, among other advantages, acts to mask the Surgeon General's warning — is limited.

Overall, the tobacco scenario is nothing less than depressing for newspapers, as it is elsewhere in the media community. RJR certainly isn't the only tobacco company slashing the ad budget. Overall newspaper ad revenues from the category fell 13.7% to $204 million in 1985 and another 36.8% to just over $129 million in 1986, says Media Records. Some rep firms, whose many-market client papers make them a good barometer, expect tobacco spending in the medium to decline another 30-to-35% this year.

TOP 20 CIGARETTE BRANDS' INVESTMENTS IN NEWSPAPERS — 1984-1986

1986 rank	Brand	Mfr.	1986 Investment	1985 Investment	1985 rank	1984 Investment	1984 rank
1.	**Players**	PM	$15,278,000	$7,498,000	8	—	—
2.	**Ritz**	RJR	11,364,000	1,415,000	—	—	—
3.	**Marlboro**	PM	9,927,000	29,064,000	1	$29,328,000	1
4.	**More**	RJR	9,307,000	14,701,000	3	10,651,000	7
5.	**Now**	RJR	8,696,000	10,177,000	6	7,503,000	12
6.	**Cambridge**	PM	8,104,000	—	—	19,000	—
7.	**Parliament**	PM	7,233,000	4,686,000	15	—	—
8.	**Carlton**	Amer	6,091,000	2,162,000	—	1,578,000	—
9.	**Century**	RJR	6,332,000	9,850,000	7	16,341,000	5
10.	**True**	Lor	4,451,000	5,783,000	11	5,528,000	14
11.	**Richland**	B&W	4,079,000	16,356,000	2	2,058,000	19
12.	**Winston**	RJR	3,553,000	10,843,000	5	8,683,000	10
13.	**Vantage**	RJR	3,005,000	5,550,000	12	17,754,000	3
14.	**Newport**	Lor	2,637,000	5,387,000	13	1,244,000	—
15.	**Merit**	PM	2,165,000	2,422,000	19	18,809,000	2
16.	**Virginia Slims**	PM	1,691,000	13,793,000	4	4,127,000	17
17.	**Pall Mall**	Amer	1,678,000	45,000	—	139,000	—
18.	**Camel**	RJR	1,452,000	2,471,000	18	10,640,000	8
19.	**Benson & Hedges**	PM	1,296,000	6,742,000	9	13,296,000	6
20.	**Kent**	Lor	1,014,000	2,631,000	17	5,603,000	13
	Total top 20		$109,353,000	$151,576,000	−28%		
	All others		16,278,000	48,258,000			
	Grand total		$125,631,000	$199,834,000	−37%		
	Percent of total		87%	76%			

Source: Media Records

Manufacturer code: Amer–American Tobacco; B&W–Brown & Williamson (BAT); L&M–Ligget & Myers (Grandmet); Lor–Lorillard (Loews); PM–Philip Morris; RJR–Reynolds

At this point, the causes are common knowledge. Americans' health consciousness has put smoking levels on the decline; according to the American Cancer Society, the only smokers' growth segment is teenage girls. Some companies have merged with or ac-

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Cigarettes					
Players	15,278,000	7,498,000	–	23,945,000	–
Ritz	11,364,000	1,415,000	–	–	–
Marlboro	9,927,000	29,064,000	29,328,000	11,062,000	13,207,000
Cargo airlines					
DHL	1,610,000	374,000	10,000	–	542,000
Emery	745,000	117,000	16,000	1,346,000	1,086,000
Southwest	420,000	–	–	–	–
Coffee					
Maxwell House	806,000	2,397,000	112,000	681,000	1,188,000
Community	418,000	328,000	149,000	161,000	176,000
Colombian Ground	334,000	269,000	143,000	83,000	31,000

CORPORATE NEWSPAPER INVESTMENTS OF CIGARETTE ADVERTISERS

	1986	Percent of total	1985	Percent change
Philip Morris	$45,750,000	41%	$66,085,000	–31%
R.J. Reynolds	44,311,000	39	68,287,000	–36
American	8,972,000	8	2,513,000	+257
Loews (Lorillard)	8,102,000	7	13,872,000	–42
BAT Industries (B&W)	5,256,000	5	27,295,000	–81
Grandmet (L&M)	21,000	—	3,672,000	–99
"Big Six" Total	$112,433,000	100%	$181,824,000	–38%

Source: Media Records/*M&MD*

quired other consumer product companies while expanding into new markets around the globe, but in the U.S., industry shipments have sagged from an all-time high of 640 billion units in 1980 to 583 billion in 1986. And extensive anti-advertising legislation proposed by Democrat Henry Waxman, a high-visibility issue for many in both houses of Congress, remains a dark cloud over the industry.

Right or wrong, onlookers speculate that tobacco companies are cutting back on media in part to make cigarettes less of a target for a selective ad ban. One thing's for sure: Declining sales have put a clamp on brand introductions, heated up competition and pressured companies to expand their point-of-sale and other non-media activities.

"Tobacco isn't a growth industry," says Robert E. Neal, group director, media administration for RJR. "Our best opportunity is to take sales away from competing companies' brands. More money is going into non-media areas such as promotion, trade merchandising and sales-related activities, which can definitely boost sales in the short term." Yet while overall spending is down, he adds, "if you balance it off against the number of brands being advertised, spending is probably not so far off."

"Newspapers are most often used for introductions because of the immediacy of the medium," notes Claude Beck, media director at Philip Morris. Not only are introductions down, marketers say, brands in test aren't making it out into the market the way they used to and some brands are being pulled off the shelves and sent back for more market testing. RJR, for instance, has eliminated its Sterling brand and pulled some other brands back into geographic tests.

Newspapers are expensive by tonnage-seeking marketers' cost-per-thousand standards, but as RJR's Neal puts it, "if you can only advertise in three media, you don't want to eliminate one." So the *Columbus Dispatch*'s refusal to accept tobacco advertising after May 1 has caused a degree of alarm. Thomas Sherrill, vice president, marketing at the paper, says the *Columbus Dispatch* made the decision to cut off "substantial revenues" it attracts from tobacco advertisers on the logic that accepting tobacco ads conflicted with its editorial writings exposing the habit's health risks.

Sherrill expects "maybe six or eight" other papers will follow within the next year, and NAB's Standen "wouldn't be surprised" if papers do cut off tobacco on an isolated basis. "But I don't see this as the wave of the future," says Standen. "I don't think it's a crisis of conscience for most publishers because publishing a tobacco ad shows support for commercial free speech."

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Computers					
IBM	14,384,000	28,703,000	33,014,000	7,786,000	4,630,000
Apple	7,864,000	8,139,000	8,026,000	5,123,000	2,235,000
Epson	7,796,000	5,975,000	9,744,000	7,237,000	146,000
Cosmetics					
Tova 9	2,356,000	2,301,000	1,878,000	1,939,000	1,040,000
Estee Lauder	893,000	823,000	631,000	679,000	432,000
Neutrogena	861,000	617,000	247,000	–	37,000
Couponers					
Valassis	169,452,000	129,958,000	99,256,000	61,735,000	38,951,000
Marketing Corp. of America – NCC/BFD	123,114,000	109,419,000	79,569,000	36,230,000	40,751,000
Marketing Showcase/Product Movers	79,995,000	79,997,000	50,675,000	35,377,000	20,543,000
Farm/garden tools					
Snapper	5,867,000	4,930,000	3,835,000	3,799,000	2,667,000
Toro	3,609,000	3,502,000	3,007,000	2,887,000	2,387,000
Lawn Boy	2,740,000	2,071,000	1,446,000	980,000	648,000
Floor coverings					
Armstrong	3,657,000	4,141,000	777,000	959,000	1,674,000
Stainmaster	543,000	–	–	–	–
Mannington	344,000	281,000	219,000	165,000	132,000

Package goods advertisers can earn retail rate parity in Pittsburgh

Manufacturers of package goods (food, health & beauty aids, proprietary drugs and alcoholic beverages) who advertise on food pages of the Sunday Press and/or daily combinations of The Press and Post-Gazette . . . can earn rates comparable to those paid by retailers.

Available in 13, 26 and 52 week programs.

For details contact:

Don Fox, 412/263-1353, Hal Schmitt, 421/263-1348
or Bill McCormick, 412/263-1336 at The Pittsburgh Press
. . . or your nearest office of Sawyer • Ferguson • Walker Co., Inc.

The Pittsburgh Press
SCRIPPS HOWARD
EVENING–SUNDAY

Pittsburgh Post-Gazette
MORNING

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Fruits & vegetable juices					
Tropicana	952,000	252,000	496,000	974,000	1,010,000
Donald Duck	477,000	129,000	203,000	266,000	52,000
Citrus Hill	430,000	–	21,000	34,000	–
Gas/oil					
Mobil	7,428,000	7,137,000	6,448,000	6,475,000	7,226,000
Exxon	3,491,000	2,742,000	1,711,000	1,808,000	1,304,000
Atlantic Richfield	1,967,000	423,000	2,848,000	313,000	532,000
Headache remedies/sedatives					
Tylenol	1,286,000	–	51,000	32,000	452,000
Bayer	358,000	52,000	177,000	10,000	157,000
Excedrin	278,000	–	–	114,000	149,000
Insurance – Life					
Physicians Mutual	2,591,000	1,996,000	2,219,000	1,705,000	1,657,000
Metropolitan Life	2,118,000	1,676,000	1,151,000	242,000	1,614,000
Prudential	1,489,000	329,000	241,000	219,000	182,000

ALCOHOLIC BEVERAGES: THE NEW ORDER

Long a newspaper advertising staple, liquor manufacturers are suffering a hangover from their heyday, aggravated by that most troublesome of trends, the "fitness lifestyle." Their sales have dropped steadily since 1980 as younger drinking Americans have switched largely to beer, wine and wine products. While their prices have been kept down and their costs of doing business have continued to rise, a host of state-tax hikes have put an extra squeeze on profits. The latest round of proposed federal taxes on liquor are more cause for worry.

They have, quite simply, less money to spend, and newspapers, like magazines, are feeling the pinch. Spending for hard liquor dropped 24.9% to $42.8 million in 1986, says Media Records, sending the alcoholic beverage category down another 10.9% to $77.9 million.

"There is just less money available for advertising in general," confirms Alan Goldin, director of House of Seagram Media. Since, as he puts it, "the job overall now is to capture share from existing competition," Seagram led the way in 1986 into using newspapers more on a promotional basis — a tactic that has worked well enough for Goldin to predict the industry will increase its promotional advertising.

"But that doesn't mean newspapers can't be used for image advertising," Goldin adds. The keys are color and price. Seagram's is looking into four-color newspaper ads to build brand images; the company is already running a black-and-white campaign of one-third vertical pages, to build the Glenlivet image, in the *Wall Street Journal*.

Price — high out-of-pocket, high CPM and, of course, the rate differential — is a bigger obstacle. The special liquor rate (essentially retail plus 15% commission) being offered by the *San Antonio Express-News, Tulsa World & Tribune, Louisiana State Times & Morning Advocate* and *Albuquerque Journal* is just what newspapers need, thinks Goldin. Meanwhile, Seagram is negotiating elimination or great reduction of the rate differential with papers across the country. Once news breaks of Seagram's success, other marketers will likely do the same.

Alcoholic beverage marketers have traditionally put the greatest ad support behind the products that are selling best. Fruity, softer, light-seeming wine coolers have made a hit with the new-generation drinker, and the pressure is on to spend — but so far in the recognized image media, tv and magazines. Coolers are one category newspaper sellers are out to crack in 1987.

Newspapers have a hope in beer, a category targeted by the joint-selling team of the NAB, *New York Times, Los Angeles Times, Chicago Tribune, Washington Post* and *Boston Globe*. Beer marketers spent 40.4% more ($27.6 million) in the medium in 1986. According to Edna Dickinson, media manager in charge of print planning for Anheuser-Busch at D'Arcy Masius Benton & Bowles/St. Louis, the 1986 total reflects a need for promotional heavy-ups in local markets and a rise in co-op advertising. Newspapers' brand-building pitch, once again, will aim to crack the age-old mindset of the medium's value. ■

AUTOMOTIVE: A FINANCING BONANZA

Lagging 1985 sales, factory surpluses and the ensuing financing battle among Detroit's Big Three automakers made the category one of the big bright spots for newspapers in 1986. With consumers' appetites whetted for low-ball pricing and competitors constantly threatening with yet another rebate or financing offer, the Big Three turned instinctively to the immediate media. As a result, the medium recorded a 12.7% increase in auto revenues ($758.4 million in total) over 1985, says Media Records.

"You're basically seeing increased support for the [financing] programs," confirms Herb Meyers, media supervisor for advertising and communications at Ford Motor Co. "They have to be announced very rapidly, so you're seeing tv and newspapers."

Major markets saw the kind of ads that newspaper publishers have been selling ever since tv captured the fancy of American viewers and marketers: long copy detailing product attributes and the best deal yet. "Newspapers allow us to put in a lot of detailed rules on short notice," agrees Edward Roggenkamp, field marketing manager for Chevrolet.

Newspapers are also proving more attractive to dealer associations, which, according to the NAB, have more money to spend and are veering away from an infatuation with spot tv.

Some of the imports have entered the financing fray as the lower end of the market swells with entries from big-name brands, such as Volkswagen's new Fox. "Imports always have been reluctant to offer incentives directly to the consumer," notes Val Corradi, vice president, automotive for the Newspaper Advertising Bureau. "But now they're emulating what the marketplace is doing."

Of course, the danger, as Corradi puts it, is that, "carmakers have trained the public to wait for better incentives." When incentives abate, newspapers will have to fight old patterns, a growing experimentation with radio and their own pricing to get the Detroit brand-building schedules that can keep their business up.

For now, admits NAB's Corradi, it's the imports — led by Mercedes-Benz, which hand picks markets for long performance and image ads — that have used newspapers to build image. While sellers see a bright spot in Chevrolet's three-step approach for Nova, which combines the separate strengths of newspapers, tv and radio, and 1988 truck rollout in newspapers, the medium plays an essentially promotional role in each case. The truck rollout featured six color pages in 50 high-prospect markets.

Still, regionalization brings another hope. Ford has had area marketing managers in place for over a year and a half, General Motors for roughly a year; and even GM agency Campbell-Ewald is correspondingly divided into regional groups. The NAB is poised to meet the trend with a new study that finds that in 1986 newspapers lowered the cost of reaching new-car buying prospects over other media by as much as 239% in the top 10 markets.

NEWSPAPER AUTOMOTIVE DOLLARS: WHERE THEY COME FROM

			Total (100%)		Percent of auto total (100%) from:		
Rank	Brand	1986 Newspaper investment	Trucks, campers, vans	Auto	Factory	Dealer assns.	Local dealers
1.	Ford	$50,999,000	9%	91%	20%	19%	61%
2.	Chevrolet	49,417,000	9	91	16	7	77
3.	Cadillac	27,644,000	0	100	3	10	87
4.	Oldsmobile	24,319,000	0	100	19	18	63
5.	Chrysler	23,363,000	0	100	39	3	58
6.	Mercedes-Benz	23,337,000	1	99	73	2	25
7.	Toyota	22,866,000	20	80	13	5	82
8.	Buick	18,875,000	0	100	12	26	62
9.	Lincoln	17,874,000	0	100	8	26	66
10.	Nissan	17,610,000	21	79	19	9	72
11.	Dodge	16,348,000	14	86	11	8	81
12.	Honda	12,058,000	0	100	10	5	85
13.	Hyundai	10,396,000	0	100	13	2	85
14.	BMW	10,378,000	0	100	52	17	31
15.	Pontiac	10,067,000	0	100	14	6	80
16.	Jaguar	9,084,000	0	100	53	8	39
17.	Volkswagen	7,361,000	7	93	38	25	37
18.	Isuzu	7,346,000	15	85	62	1	37
19.	Acura	7,084,000	0	100	25	2	73
20.	Peugeot	6,993,000	0	100	75	8	17
21.	Mazda	6,173,000	10	90	4	6	90
22.	American	5,855,000	0	100	7	27	66
23.	Volvo	5,754,000	1	99	48	10	42
24.	Audi	5,593,000	0	100	46	13	41
25.	Subaru	5,210,000	0	100	9	18	73

Source: Media Records/*M&MD*

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Jewelry/watches					
Seiko	3,089,000	3,466,000	5,163,000	1,252,000	1,299,000
Movado	751,000	319,000	267,000	326,000	94,000
Concord	509,000	386,000	303,000	353,000	392,000
Lotteries					
New York State	1,010,000	1,317,000	702,000	793,000	923,000
California	979,000	752,000	–	–	–
Connecticut	731,000	347,000	222,000	262,000	283,000
Liquors					
Seagram's	3,304,000	4,332,000	5,694,000	1,516,000	3,418,000
Dewar's White Label	1,564,000	2,719,000	1,475,000	1,292,000	929,000
Ballantine's	1,394,000	1,841,000	1,623,000	1,149,000	253,000
Magazines					
Spirit of America	1,881,000	–	–	–	–
Vista	1,782,000	414,000	–	–	–
Time	1,117,000	1,907,000	1,470,000	1,803,000	2,526,000

Big spenders.

Tampa Bay is home to some of the biggest spenders in Florida. In 1985, St. Petersburg-Tampa-Clearwater residents rang up $11.5-billion in total retail sales, making this metro area second in the state and third in the entire Southeast.

If you want some big spenders to spend some time with you, invest in the biggest and best newspaper in Tampa Bay, the St. Petersburg Times.

Tampa Bay's most popular paper leads its closest competitor by nearly 60,000 copies daily and more than 68,000 on Sunday!* So start thinking big. Big spenders, big audience, big profits. Call your St. Petersburg Times representative at 813/893-8249 today!

*ABC FAS FAX 6 months ending 3/31/86.

St. Petersburg Times

Represented nationally by CWO & O.

TAHITI
HAWAII

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Mail order					
Franklin Mint	7,298,000	6,960,000	6,654,000	8,340,000	8,678,000
Shopping Mart	3,807,000	4,049,000	5,335,000	5,253,000	3,344,000
Old Village Shop	2,152,000	817,000	157,000	1,981,000	3,733,000
Meats/fish/poultry					
Perdue Chicken Products	3,397,000	923,000	417,000	739,000	1,519,000
Bryan Meat Products	566,000	431,000	422,000	380,000	436,000
Hormel Meat Products	557,000	1,529,000	5,122,000	4,299,000	3,203,000
Newspapers					
The Wall Street Journal	1,259,000	530,000	557,000	649,000	423,000
Times Mirror Co.	1,120,000	138,000	403,000	–	–
The New York Times	773,000	500,000	1,249,000	–	44,000
Office equipment (minus computers)					
Xerox	5,012,000	8,882,000	7,819,000	12,892,000	5,728,000
IBM	2,255,000	1,907,000	491,000	1,227,000	2,598,000
Canon	1,199,000	1,912,000	1,575,000	163,000	4,000
Paints					
Sherwin Williams	1,061,000	1,852,000	891,000	647,000	353,000
Benjamin Moore	659,000	504,000	579,000	311,000	277,000
Olympic	373,000	1,131,000	55,000	71,000	327,000

AIRLINES: THE SKY'S THINNING

Hype, hype and more hype was the rule in a one-upmanship promotional year for the airline industry. Where there's blaring promotion, it seems, there's a success story for newspapers. The war of discount fares that dropped as far as the $50 range boosted air travel to record levels (over 418 million passengers, with over 450 million expected in 1987) and fueled a newspaper spending total of $339.5 million, an increase of 14% over 1985 by Media Records' measure.

Just as it did for deal-offering automakers, the newspaper medium provided airlines with a vehicle for getting out complicated fare promotions overnight. Eastern Airlines vice president of advertising William Dowse, for one, increased his company's spending 14.4% to nearly $30 million in 1986. He doesn't see the fare environment settling down anytime soon. "I think you're going to see constant experimentation with discounts to level off some of the dips we always have in our traffic," he says.

Major-market papers (homes of the largest airports) got the bulk of the business from the top U.S. carriers. That stands to reason: Anywhere from 60-to-75% of top airlines' revenues, Dowse thinks, stem from the top 20 markets. As long as fare discounts keep going strong, major market papers will be kept happy.

But sellers see some turbulence ahead. Since May 1985, the Department of Transportation has approved 19 mergers and acquisitions of airline carriers, the most celebrated including Texas Air's October 1986 acquisition of Eastern Airlines. As a result, newspaper sellers face a category where there are fewer advertisers with less money to spend, since mergers rarely produce overall budgets that combine each party's individual outlays. In some cases, the mergers add speed to an ongoing, industrywide consolidation of routes that favors high-traffic markets. The bet is that merger partners will concentrate spending even more heavily in the markets that bring them the highest volume.

While legislation facing other categories could hurt newspapers, the medium might get a boost if one of two bills requiring airlines to be more complete in spelling out fare opportunities in ads passes in Congress (see "On the Docket," pg. 148). That would buck a trend, kicked off by United Airlines, toward advertising fare opportunities with a general price range in tv spots.

Price — specifically the medium's refusal to cut the rate differential for airlines that have local ticket offices — is heating up as an issue as control concentrates within the industry. One direct marketing route that has caught marketers' fancies is to sell special offers to specific customers constituencies (frequent flyer clubs, for example) listed in central data banks.

"I think this bodes badly for newspapers in the long run," says Dowse. "1986 will prove to be a vintage year, like 1961 in Bordeaux wines. We'll probably never reach those levels of newspaper advertising again."

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Pet foods					
Purina	1,052,000	1,405,000	1,030,000	1,565,000	2,163,000
Iams	366,000	302,000	–	–	–
Alpo	347,000	562,000	1,444,000	776,000	247,000
Phonographs/records/tapes					
Columbia	8,819,000	10,211,000	10,274,000	7,959,000	7,018,000
RCA	3,905,000	4,330,000	6,712,000	8,723,000	6,966,000
CBS	2,923,000	2,178,000	939,000	280,000	87,000
Prepared dishes					
Swanson	525,000	78,000	144,000	177,000	238,000
Old El Paso	351,000	250,000	245,000	49,000	–
On Cor Entrees	324,000	607,000	902,000	299,000	95,000
Public utilities					
AT&T	30,098,000	49,565,000	47,865,000	23,610,000	4,426,000
General Telephone & Electronics	14,862,000	13,382,000	11,299,000	4,655,000	1,258,000
NYNEX	8,953,000	5,379,000	4,372,000	1,331,000	–
Radio/tv sets					
RCA	1,643,000	1,427,000	6,391,000	3,936,000	2,991,000
Zenith	897,000	1,220,000	1,602,000	963,000	865,000
NEC	641,000	–	–	–	–

AKRON BAG LADIES

They're everywhere. Toting bags. Pushing shopping carts filled to the brim...with groceries.

In the four-county area surrounding Akron, shoppers spent nearly $1.4 billion on food purchases. That's no small potatoes. The problem is these shoppers may not be buying your brand if you're not advertising in their brand of newspaper—The Beacon Journal.

Considering 30% of the Cleveland ADI is in the Akron Newspaper Designated Market, you may be missing a lot of coupon clippers who shop at the large regional chains as well as locally owned and operated supermarkets. With daily readership totalling 312,000, The Beacon Journal provides a large audience hungry for your products.

Put Akron on your media shopping list. Advertise in the city's appetizing newspaper.

The Beacon Journal

44 East Exchange Street Akron, Ohio 44328 216/375-8261 A Knight-Ridder Newspaper

Circulation Figures/1986 ABC Reports

Population & Household Figures/© 1987 S&MM Survey of Buying Power Data Service

Preserve the wild life.

Every year, more families are choosing to make their home closer to the forest. They're choosing to keep the home fires burning. Which they will. As long as you don't burn down their home. Remember. Only you can prevent forest fires.

A Public Service of the Ad Council, the U.S.D.A. Forest Service and your State Forester.

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Radio/tv stations					
NBC	8,094,000	9,852,000	10,067,000	7,816,000	11,383,000
CBS	7,811,000	9,113,000	9,649,000	6,695,000	8,424,000
ABC	7,198,000	14,388,000	12,144,000	10,228,000	10,241,000
Railroads					
Amtrak	3,800,000	6,756,000	9,505,000	5,979,000	5,358,000
Conrail	1,560,000	1,353,000	162,000	26,000	63,000
Assn. of American Railroads	346,000	332,000	10,000	112,000	167,000
Ranges/stoves/dishwashers					
Kitchen Aid	2,424,000	3,139,000	1,750,000	766,000	1,012,000
G.E.	1,287,000	1,485,000	1,455,000	2,182,000	655,000
Jenn	570,000	405,000	767,000	612,000	339,000
Soaps/cleansers/polishes					
Morton water softener	594,000	534,000	545,000	25,000	112,000
Tide	246,000	621,000	18,000	20,000	20,000
Bold	159,000	78,000	–	11,000	13,000
Soft drinks					
Pepsi-Cola	6,239,000	4,323,000	3,268,000	5,198,000	2,410,000
Coca-Cola	4,108,000	5,644,000	3,893,000	4,267,000	2,535,000
Slice	2,419,000	1,102,000	187,000	–	–

Herald City:
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households.

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U.S. hostage slay
This Week
John Drury

One unbeatable TMC opportunity.

Herald City is the 48 northwest and western Chicago suburbs that call the Daily Herald their newspaper. Suburbs with a median income of $42,000* and a median home value of $117,487*. Suburbs *spending more per household in total retail sales* than any equivalent suburban area. The new "reader friendly" Daily Herald, plus This Week, its sprightly companion publication, give you *total market coverage* of Chicagoland's most dynamic market. Call Jim Walsh at 312-870-3600.

*Source: CACI Demographic Services

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FIGHT CANCER. EAT YOUR VEGETABLES.

There's strong evidence your greengrocer has access to cancer protection you won't find in any doctor's office.

Like broccoli, peaches, spinach, tomatoes, citrus fruits and various other types of fruits and vegetables. They may help reduce the risk of some forms of cancer.

Write for more information.

AMERICAN CANCER SOCIETY

1986

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1986	1985	1984	1983	1982
Steamship lines					
Royal Caribbean	7,175,000	6,591,000	6,860,000	4,580,000	2,577,000
Norwegian Caribbean	6,075,000	7,043,000	5,028,000	4,684,000	3,898,000
Cunard	5,467,000	8,791,000	9,519,000	4,947,000	5,232,000
Tours/travel service					
Liberty Travel	13,871,000	10,901,000	7,872,000	5,356,000	3,853,000
American Express	12,712,000	14,121,000	10,793,000	7,226,000	8,557,000
May Co. World Travel	9,858,000	5,256,000	4,380,000	4,349,000	1,765,000
Trucks/campers/vans					
Ford	4,769,000	4,116,000	3,328,000	2,747,000	1,578,000
Chevy	4,661,000	4,355,000	2,630,000	1,481,000	1,267,000
Toyota	4,474,000	3,732,000	4,583,000	1,476,000	1,561,000
Wearing apparel					
Fashion Galaxy	1,309,000	727,000	25,000	147,000	–
Esprit Apparel	659,000	20,000	–	–	62,000
Hush Puppies	620,000	664,000	1,354,000	1,876,000	1,290,000
Wine coolers					
Dewey-Stevens	1,103,000	–	–	–	–
Seagram's	595,000	301,000	–	–	–
Babrys Champagne Cooler	256,000	633,000	–	–	–

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1986

NATIONAL ADVERTISING INVESTMENTS IN NEWSPAPERS, 1986-1985

Classification	1986 (000)	1985 (000)	Percent change
AUTOMOTIVE			
Gasoline & Oil Companies	$23,899	$18,164	+31.6%
Leasing & Rentals	71,546	78,759	−9.2
Parts, Accessories & Supplies	7,188	7,227	−0.5
Passenger Cars (New)	622,866	537,998	+15.8
Trucks, Trailers & Mobile Homes	31,511	28,366	+11.1
Automotive Not Elsewhere Classified	1,424	2,653	−46.3
AUTOMOTIVE TOTAL	$758,434	$673,167	12.7
GENERAL			
Alcoholic Beverages	77,936	87,459	−10.9
Beers	27,614	19,665	+40.4
Wines	7,535	10,813	−30.3
Liquors	42,787	56,981	−24.9
Amusements	18,315	13,546	+35.2
Cameras, Photo Supplies & Services	13,017	13,950	−6.7
Computers, Equipment & Services	54,368	92,651	−41.3
Educational	62,972	56,446	+11.6
Farm & Garden	40,702	37,604	+8.2
Foods	138,555	150,946	−8.2
Baby Foods	305	969	−68.5
Bakery Goods	8,543	9,267	−7.8
Baking Mixes, Flour & Ingredients	1,280	996	+28.5
Beverages	42,536	42,283	+0.6
Coffee	3,557	5,605	−36.5
Tea	1,236	1,330	−7.1
Fruit & Vegetable Juices	4,727	3,941	+19.9
Soft Drinks-Carbonated-Diet	2,842	3,268	−13.0
Soft Drinks-Carbonated-Non-Diet	22,444	21,969	+2.2
Miscellaneous Beverages	7,730	6,170	+25.3
Cereals	2,470	3,395	−27.2
Condiments	7,557	6,436	+17.4
Confectionery & Snacks	4,606	8,748	−47.3
Dairy Products	19,341	20,720	−6.7
Desserts & Dessert Ingredients	562	1,384	−59.4
Fruits & Vegetables	5,244	7,457	−29.7
Macaroni Products-Uncooked	1,992	1,844	+8.0
Meats, Fish & Poultry	19,959	19,210	+3.9
Prepared Dinners & Dishes	6,794	7,652	−11.2
Shortenings, Oils & Margarines	1,906	4,472	−57.4
Soups	1,253	2,627	−52.3
Sugars, Syrups & Jellies	1,830	1,696	+7.9
Miscellaneous Foods	12,377	11,790	+5.0
Franchise Offers	6,031	9,016	−33.1
Help Wanted	80,251	97,466	−17.7
Hotels & Motels	220,421	196,451	+12.2
Hotels, Motels & Resorts	167,621	147,806	+13.4
Resort Area Development	52,800	48,645	+8.5
Household Furniture & Furnishings	20,180	24,499	−17.6
Floor Coverings	5,777	5,394	+7.1
Furnishings	9,529	14,818	−35.7
Furniture	4,874	4,287	+13.7
Household Heating & Home Heating Equipment	10,838	14,627	−25.9
Household Supplies	30,017	42,304	−29.0
Aluminum & Paper Products	2,455	5,398	−54.5
Disinfectants & Insecticides	1,327	2,059	−35.6
Home Building Materials & Tools	10,542	14,463	−27.1
Paints, Wall Coverings & Other Finishes	5,015	7,688	−34.8
Soaps, Cleansers & Polishes	6,030	8,250	−26.9
Miscellaneous Household Supplies	4,648	4,446	+4.5
Household Equipment & Appliances	69,711	73,731	−5.5
Air Conditioning	7,525	7,292	+3.2
Phonographs, Records, Tapes & Recorders	23,952	24,361	−1.7
Radio & TV Sets	4,796	6,239	−23.1
Ranges, Stoves & Dishwashers	6,011	7,510	−20.0
Refrigerators & Freezers	1,572	1,794	−12.4
Small Electrical Appliances	3,323	3,821	−13.0
Washers & Dryers	1,017	1,355	−24.9
Miscellaneous Household Equipment & Appliances	21,515	21,359	+0.7
Industrial	59,774	65,655	−9.0
Aircraft & Equipment	2,904	3,273	−11.3
Industrial Area Development	7,833	6,040	+29.7
Office Equipment & Stationery Supplies	15,350	22,827	−32.8
Industrial Materials & Machinery	12,253	12,434	−1.5
Miscellaneous Industrial	21,434	21,081	+1.7
Insurance	89,456	84,132	+6.3
Life, Health & Medical	84,965	78,763	+7.9
Fire Casualty & Other	4,491	5,369	−16.4
Jewelry, Watches & Silverware	9,253	11,807	−21.6
Mail Order	60,013	55,867	+7.4
Medical Products & Drugs	19,800	19,655	+0.7
Pets & Pet Supplies	5,638	7,228	−22.0
Pet Foods	3,482	4,907	−29.0
Pets & Pet Supplies	2,156	2,321	−7.1
Political	18,779	6,619	+183.7
Professional & Service	24,510	21,036	+16.5
Public Service Utilities & Communications	151,651	176,720	−14.2
Publishing & Media	241,969	237,436	+1.9
Books	43,071	39,600	+8.8
Magazines	26,026	26,996	−3.6
Newspapers	9,380	9,558	−1.9
Radio & TV Stations	163,492	161,282	+1.4
Real Estate	70,227	65,581	+7.1
Sporting & Leisure Time Equipment	7,063	7,645	−7.6
Tobacco	129,009	204,013	−36.8
Cigars	1,131	1,511	−25.1
Cigarettes	125,631	199,834	−37.1

1986

NATIONAL ADVERTISING INVESTMENTS IN NEWSPAPERS, 1986-1985

Classification	1986 (000)	1985 (000)	Percent change
Tobacco & Smoking Accessories	2,247	2,668	−15.8
Toiletries & Toilet Goods	24,522	30,594	−19.8
Cosmetics, Make-Up & Manicure Products	10,261	9,830	+4.4
Dental Supplies & Mouthwashes	1,200	4,273	−71.9
Feminine Hygienic Products	179	2,237	−92.0
Men's Toiletries & Hair Products	1,574	2,792	−43.6
Men's & Women's Shaving Equipment	375	272	+37.9
Perfumes & Toilet Water	1,514	1,105	+37.0
Toilet Soaps, Bath Powders & Deodorants	2,300	3,270	−29.7
Women's Hair Products & Treatments	4,198	496	+746.4
Miscellaneous Toiletries & Toilet Goods	2,921	6,319	−53.8
Transportation	648,069	604,593	+7.2
Airlines	339,501	297,758	+14.0
Domestic	176,630	170,884	+3.4
International	158,948	121,610	+30.7
Cargo	3,923	5,264	−25.5
Bus Lines	10,934	9,866	+10.8
Railroads	7,502	10,153	−26.1
Steamships	91,198	91,947	−0.8
Tours & Travel Service	192,494	186,417	+3.3
Miscellaneous Transportation	6,440	8,452	−23.8
Wearing Apparel	26,705	29,005	−7.9
General Not Elsewhere Classified	471,512	424,538	+11.1
GENERAL TOTAL	**$2,901,264**	**$2,962,820**	**−2.1**

Classifications projected to U.S. totals by Media Records ©1986

The full report is available from Media Records, Seven Penn Plaza, New York, N.Y. 10001. Prices are $1,275 for the full report; $190 to $370 for complete class breakouts; and $135 for a sub-class reading.

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BRAND REPORT

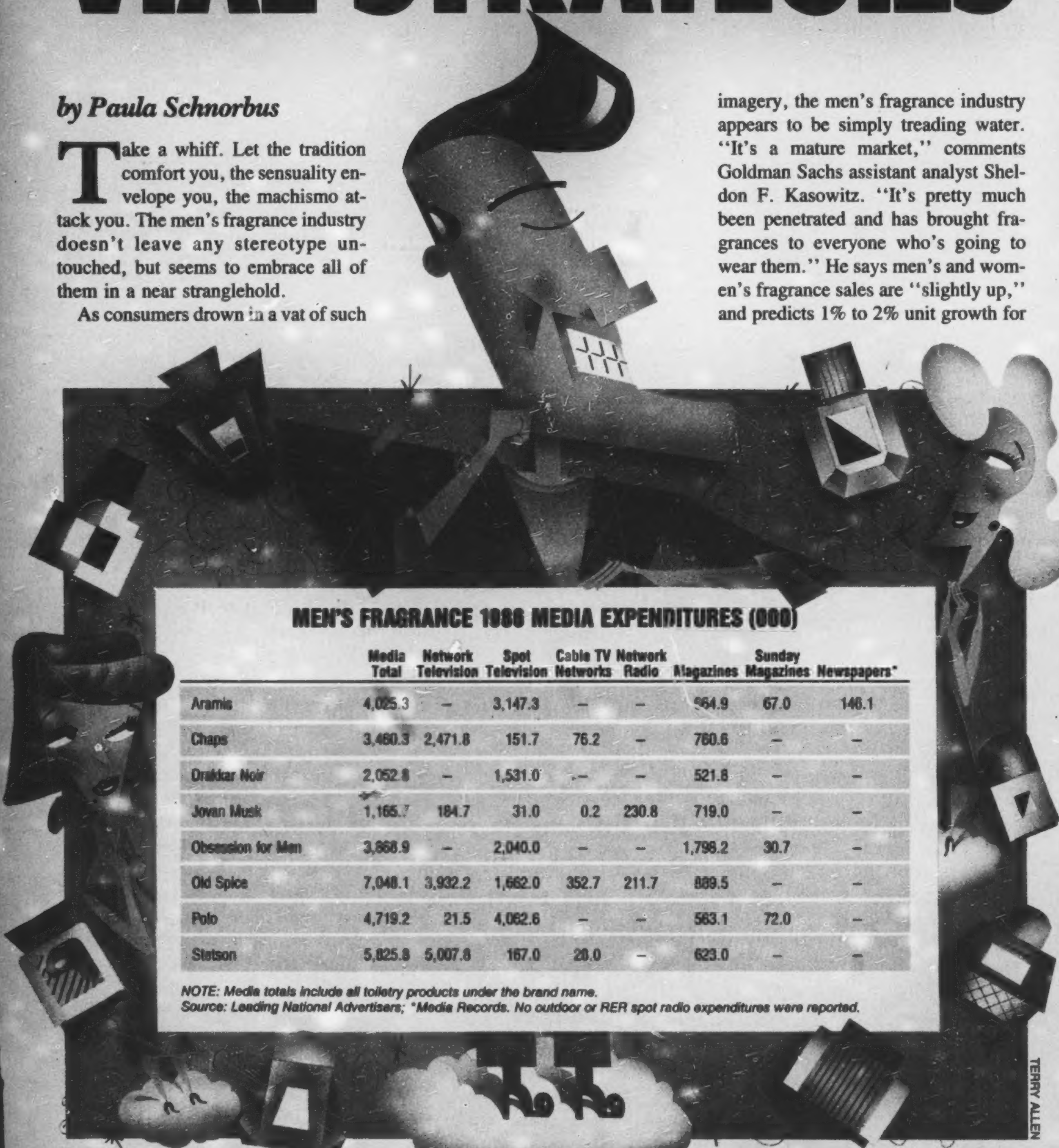
No. 143: Men's Fragrances

VIAL STRATEGIES

by Paula Schnorbus

Take a whiff. Let the tradition comfort you, the sensuality envelope you, the machismo attack you. The men's fragrance industry doesn't leave any stereotype untouched, but seems to embrace all of them in a near stranglehold.

As consumers drown in a vat of such imagery, the men's fragrance industry appears to be simply treading water. "It's a mature market," comments Goldman Sachs assistant analyst Sheldon F. Kasowitz. "It's pretty much been penetrated and has brought fragrances to everyone who's going to wear them." He says men's and women's fragrance sales are "slightly up," and predicts 1% to 2% unit growth for



TERRY ALLEN

MEN'S FRAGRANCE 1986 MEDIA EXPENDITURES (000)

	Media Total	Network Television	Spot Television	Cable TV Networks	Network Radio	Magazines	Sunday Magazines	Newspapers*
Aramis	4,025.3	–	3,147.3	–	–	664.9	67.0	146.1
Chaps	3,460.3	2,471.8	151.7	76.2	–	760.6	–	–
Drakkar Noir	2,052.8	–	1,531.0	–	–	521.8	–	–
Jovan Musk	1,165.7	184.7	31.0	0.2	230.8	719.0	–	–
Obsession for Men	3,868.9	–	2,040.0	–	–	1,798.2	30.7	–
Old Spice	7,048.1	3,932.2	1,662.0	352.7	211.7	889.5	–	–
Polo	4,719.2	21.5	4,062.6	–	–	563.1	72.0	–
Stetson	5,825.8	5,007.8	167.0	28.0	–	623.0	–	–

NOTE: Media totals include all toiletry products under the brand name.
*Source: Leading National Advertisers; *Media Records. No outdoor or RER spot radio expenditures were reported.*

There isn't any shortage of raw flesh in Obsession for Men product ads.

the men's scents.

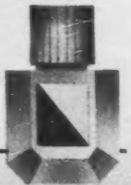
Annette Green, executive director of the Fragrance Foundation, says the only reason the industry has grown at all is because men have started to buy cologne themselves rather than just receiving it as a Christmas or Father's Day gift.

Some of that hard-earned growth may be the result of a rethinking of marketing tactics. Fragrances once targeted only to businessmen in their 30's are being opened up and pitched to a younger, upscale man. Ralph Lauren's Polo is corraling in new customers through an aggressive direct-mail campaign that has been an "enormous success." And Obsession for Men scored with scented magazine inserts and tv ads in a pre-sell campaign that ran months before the fragrance was on store shelves.

William Fitzgerald, marketing consultant, says the straight liquid of colognes and aftershaves is about a $1.2 billion industry. "It had been doing very well over the past few years," he says, "but it slowed down in 1986." Fitzgerald contradicts reports of growth in the category. He admits that the gross rates of men's fragrances have been better than the women's market. But Fitzgerald also notes that the prices of men's fragrances are rising while overall sales are decreasing.

As for more male customers, "It took a long time in America for men to get serious about *deodorants*," says Fitzgerald. The makers of the biggest-selling fragrances maintain that women buy 50% to 70% of the potions for the men in their lives, which explains the dual nature of most marketers' media plans. Rayda Vega, a senior creative perfumer at fragrance supplier de Laire, maintains that traditionally, "Men don't go and shop for their colognes. They say to their wives, 'Pick up my usual.' "

Traditional men won't buy cologne. "The more eclectic, better educated, higher income male may change. Rudy Redneck will stay as he is."



To attract women to a specific men's cologne, a company may make his-and-her gift sets or provide incentives of a gift-with-purchase for a cologne or a purchase-with-purchase offer by which buying a fragrance for a certain amount makes the customer eligible to buy something else at a discount price. These GWP's and PWP's, as they are called, are becoming the bane of the industry's existence. "It's merciless because, if you give away a product," says Fitzgerald, "you might as well give them a $10 bill. Some of this stuff lasts a long time. Even a small bottle can take them out of the market three months or more."

Trying to get a man into a fragrance department entails education, observes Fitzgerald. "The more electric, better educated, higher income male may change. Rudy Redneck will stay as he is," he quips. Scent strips in magazines are hailed by some manufacturers and analysts as the way to sneak in a sniff for men who are cologne-counter shy. The strips also may carry order forms or toll-free numbers to bypass a department store and receive a free sample in the mail.

Alan Mottus, independent industry consultant, notes that the success of Estee Lauder's Aramis stems from cross-selling the product to women by initially placing Aramis at the Estee Lauder counter. Men's colognes also are sold in store cosmetic areas and in men's clothing departments, where it is believed men will feel more comfortable trying fragrances.

Men's fragrances are advertised predominantly on television, in women's books around holidays as well as men's books and in trade magazines such as *Product Marketing* and *Women's Wear Daily*. Co-op advertising in local newspapers is done in conjunction with retailers for promotional activities.

The industry splits fragrances into two categories: mass-market and department or specialty store brands.

Mass-market colognes are generally found in drugstores. This category tries really hard not to step on a man's masculinity by offering "comfortable" aromas with names like Old Spice and Chaps.

The department store group is seemingly more adventurous, certainly sexual, i.e., Obsession for Men, and quite obviously pitched to yuppies, such as the Aramis ad with a well-dressed young man on the go with his *Wall Street Journal* and squash racket tucked into his knapsack. Cosmair Inc.'s Jane Terker, vice president of marketing, men's division of designer fragrances, explains that department store and drugstore fragrances are targeted to "totally different customers." A department store has an atmosphere designed for shopping around and trying different products, she explains. In a drugstore, a customer is coming in to buy necessities like toothpaste and deodorant. Cosmair markets its Polo and Drakkar Noir fragrances in department stores and Chaps in drugstores.

The "sex appeal" marketing ploy used by many of the men's fragrance companies is diminishing, Green observes, adding that AIDS awareness "will shift away the eroticism of fragrance appeal. The industry will have to show fragrance at a variety of levels," Green says. "We have only seen the tip of the iceberg."

STETSON FITS.
STETSON

The Stetson name gives men "permission" to wear cologne.

Following is a recent list of the top-selling colognes. This list is based on information from Charles H. Kline & Co., a market research firm; Goldman Sachs analysts' reports; and Rayda Vega of de Laire.

The biggest selling mass-market brands are said to be Old Spice, Chaps, Stetson and Jovan Musk. Sources say recent market shares, based on all toiletry items under those brand names, are about 9.6% for Old Spice; 9.5% for Chaps; 7.6% for Stetson; and 5.8% for Jovan Musk.

The current biggest-selling department store brands are Aramis, Polo, Drakkar Noir and Obsession for Men. Market share of the brands is Aramis, 20%; Polo, 15% to 16%; Drakkar Noir, 6% to 7%; and Obsession for Men, 4% to 5%, according to Alan Mottus. He cautions that Obsession for Men's share is deceivingly low. He notes the fragrance was introduced late last year, but "wherever it was sold, it was selling better than any fragrance" during November and December.

Stetson tries to rope men into wearing the cologne by being easy to wear and comfortable.

MASS MERCHANDISERS

Stetson

Men are so hung up about wearing cologne that Stetson is trying to rope them in by satisfying men's emotional needs as well as rational objectives.

"Emotionally," says Joseph DiPietro, group marketing director of men's fragrances of the Coty division of Pfizer Inc., Stetson is appealing "because the Stetson name has been around for 125 years. It gives men permission to wear cologne." Rationally, Stetson is "comfortable and easy to wear."

Hence, taglines of "Stetson Fits" and "Appropriate for the Man You Are." Most of Stetson's business can be found by placing an upside down "T" across the U.S., with a concentration in the Southwest. In 1986, Stetson pulled in about $60 million in U.S. retail sales based on suggested prices, up 25% from 1985. DiPietro says that Stetson's sales are expected to be up another 25% in 1987.

Stetson is pitched to 18- to 49-year-old men, as well as women. About 85% of Stetson's 15- and 30-second ads are on network tv, mostly prime time shows such as *Dallas*, *Dynasty*, *Scarecrow & Mrs. King* and Monday night movies. Last year, the fragrance was advertised during the baseball playoffs and also on National League Football games. College sports are used on a local basis when the sales department asks for specific help, says DiPietro.

"At gift-giving time, women are important," DiPietro observes. During Christmas season, Stetson is more likely to be seen in gift guides and women's books such as *Cosmopolitan*, *Good Housekeeping*, *Seventeen* and *Essence*. Otherwise, magazines placements run the gamut. *People* is used for dual appeal, for example. And because of Stetson's "heritage," *Field & Stream* and *Outdoor Life* are used to talk directly to men. Radio isn't regularly used.

Stetson's big promotional event this

AMERICA'S
ALL-TIME FAVORITE
Old

Old Spice targets a man who respects his family and his wife.

year is the "Great Outdoors Sweepstakes." They will be giving away fishing trips to Mexico, camping equipment and hunting outfits. In-store, DiPietro adds that because of Stetson's "continuing momentum," the product is getting increased shelf space, although some stores say "if you're not going to have a coupon or 99-cent specials, we don't want you." Periodically, Stetson will do display allowances, or pay for a contract to keep the product on display for a certain time period, says DiPietro. Shoppers, meanwhile, get Stetson-saturated towelettes as they wander the aisles.

Free samples also are provided at hotels such as Holiday Inn.

A joint promotion with Norelco for Stetson's recently introduced pre-electric shave lotion is being advertised in *Reader's Digest* and *Sports Illustrated*. The promotion includes tv advertising and free-standing inserts in Sunday newspapers that are expected to reach some 50 million homes.

Overall, Stetson's budget is 10% to 15% higher than last year, during which about $5.8 million was spent, says DiPietro, quoting LNA. Most of the expenditures were in network tv.

DiPietro says there may be a new commercial this Christmas by Warwick Advertising, which has been Stetson's agency since the beginning in 1981.

Chaps

Chaps is the mass-marketed Cosmair product under the Ralph Lauren banner for "people attracted to the designer image of Ralph Lauren and all he stands for."

Ron Rolleston, marketing director, Ralph Lauren/Chaps, says the scent is formulated for the 18- to 34-year-old group that has an annual income of more than $25,000. Chaps was introduced nationally in 1980, and a musk fragrance extension was rolled out two years ago.

Because the tagline of Chaps Musk is "Living Without Boundaries," sweepstakes are currently underway with a grand prize of a trip to any of the seven continents, be it Australia or Antarctica, and an additional prize of an Isuzu Trooper II. No purchase is required, but as an incentive, there are American Express "action checks" whereby a customer can buy a product at a $1 discount and gain immediate entry into the sweepstakes. Cosmeticians may put their names on the backs of the checks and be eligible to win an Isuzu. There are also men's grooming bags that are free with any Chaps purchase. Inside the bag is a 1.8-ounce bottle of cologne, after-shave or spray cologne.

The original Chaps is advertised on network and spot tv in 15- and 30-second commercials during prime time, late night, network news and daytime. Shows include *The Equalizer*, *Falcon Crest* and *Murder, She Wrote*. The musk fragrance is advertised in *People*, *Rolling Stone* and *Playboy*. Neither radio nor outdoor ads are currently used.

Chaps gives away trips to anywhere from Antarctica to Australia.

LNA reports that last year about $3.5 million was spent on advertising, a figure Rolleston calls "low." He says about $6 million to $7 million is being spent on promotions and advertising this year. Geers Gross is the ad agency.

Old Spice

Old Spice, which started flowing in 1936, is the grandfather of all the colognes discussed here, and its image is seemingly as old-fashioned. The voice-over in a recent tv ad states that Old Spice is "the favorite scent of the American man, and he'll never change his tune."

Old Spice is targeting males as young as 18, but you won't see any naked bodies or independent men involved in action-packed sports. Instead, the viewer sees family scenes reminiscent of *Father Knows Best*. Says Sheila Hopkins, strategic business unit manager for men's fragrances at Shulton Inc., a unit of American Cyanamid Co., "We are targeting against a traditional American man. He maintains respect for his family and his wife. He is a hard-working guy, not a trendy guy, but not old-fashioned. Our user is probably like a Budweiser user. You find him all over America; he's not upscale, but he's not necessarily downscale."

The bulk of advertising is on tv. The year-round ads are 30 seconds while 15-second ads also are used during Christmas. Commercials at Christmas are mostly in prime time and on soap

FIELD & STREAM

America's Number One Sportsman's Magazine.

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Close contact with our readers through the years. That's what has made us America's Number One Sportsman's Magazine. The authority in the outdoor field.

THE OUTDOOR LEADER IN TOTAL AUDIENCE, AD PAGES, AD REVENUE, AND CIRCULATION.

Field & Stream consistently leads Outdoor Life and Sports Afield in revenue and pages. Because we deliver more men, more efficiently than those two magazines combined. In fact, one ad in **Field & Stream** reaches nearly 2/3rds of all sportsmen who read the major outdoor magazines—a claim few magazines in any field can make.

MOST EFFICIENT AMONG MAJOR MEN'S MAGAZINES.

Field & Stream leads the major men's publications in efficiently reaching the mass male market. We deliver 7.4 million men more efficiently than Time, Sports Illustrated, Newsweek, U.S. News & World Report, Playboy and Penthouse.

Few magazines know their readers like we do. Because we get closer to them—by entertaining, informing and hitting controversial issues head on. After ninety years, we continue to deliver an award-winning tradition of editorial excellence and authority. **Field & Stream.** The number one way to reach the mass male market.

Field & Stream is a CBS Magazine.
Source: 1986 SMRB, ABC

conducted at the retail level, and, if the retailer wins, the sales representative may win prizes and money.

Peak retail times are back-to-school season and after-Christmas values during January as well as Christmas and Father's Day. Jovan targets men and women by offering his/her gift sets, which the company calls a "strong success."

About 60% of Jovan's ads are in television; 40% in print and 10% in trade magazines. Tv shows used include *NBC Friday Night Videos*, *The Tonight Show*, *Hunter* and *Late Night with David Letterman*. Cable tv includes Black Entertainment and Black College Sports.

HBM Creamer/Boston has been the ad agency since September. Zwiren & Wagner/Chicago was dropped when, a spokeswoman says, the company "thought it was time for a change in direction and concept."

A Jovan spokeswoman wouldn't comment on the ad budget except to say it was up 30% from last year. LNA reports that 1986 ad expenditures for Jovan for men were about $1 million.

An American Hero

Jack Lemmon's son pushes Aramis to younger men.

DEPARTMENT/SPECIALTY STORES

Aramis

Ahhh, Aramis. Dab it on your wrists, behind your ears, rub a few drops into your scalp. . .

Your scalp? Yes, Aramis, best known for its fragrance of "aromatic woods, exotic spices and sensuous undertones," has added Nutriplexx, a "thinning-hair supplement," to its product line.

In its 23-year existence, Aramis, the department-store leader, has always been pitched to the "urbane, sophisticated man" in his 30's to early 40's, explains Daria Myers, executive director of marketing for Aramis, a division of Estee Lauder Inc. Thinning hair is a problem that starts in their early 20's, she points out, and the product should catch the attention of younger consumers.

"We've become much more than a fragrance company, but a product company with innovative products," says Myers — hence, Nutriplexx. Certain products such as moisturizers will soon be available for the older consumer segment.

To reach the younger audience with its overall message, Chris Lemmon, son of actor Jack Lemmon, is Aramis' new model, representing a "definite younger image" with his wire-rimmed glasses and knapsack over his back.

TAMPA
BAY
METRO
AREA

The Market:
- 1st in Florida in population
- 1st in Florida in households
- 1st in Florida in effective buying income
- 1st in Florida food sales

S&MM Survey of Buying Power©, 1986

The Medium:
- More 25-54 year-old readers
- More readers in top level occupations
- More food buyers spending $150+ per week
- More readers who are affluent adults ($50,000+HHI) than any daily newspaper in the market

Simmons-Scarborough National Newspaper Rating Study, 1985

The Answer:
THE TAMPA TRIBUNE
A Media General Newspaper represented nationally by Sawyer-Ferguson-Walker

For more detailed information, send your business card to Joe Gess, General Advertising Manager, The Tampa Tribune, P.O. Box 191, Tampa, FL 33601-4005, or call (813) 272-7447 to request your free copy of the 1986 edition of The Quality Buy or other market and product information.

His business suit doesn't hide a more happy-go-lucky side.

Tv commercials may be 10 or 30 seconds and appear on network and spot tv during shows such as *Dallas, Magnum, The Cosby Show* and *Hill Street Blues*. Myers notes that the promotional or straight fragrance commercials are geared to both men and women because the latter purchases 60% to 70% of the products. In fact, Aramis' initial positioning at counters alongside the Estee Lauder line of women's products is credited with firmly rooting the scent in the crowded retail arena. Nutriplexx tv commercials, however, are pitched to men.

Magazines used are *GQ, Esquire, Interview* and also American Airlines and Eastern Airlines publications. Aramis ads also appear in *Texas Monthly* and the *New York Times Sunday Magazine*. The first section of Sunday newspapers are used as well as a new approach to run ads in Thursday newspapers. The Nutriplexx ads, for example, will appear in Thursday papers because "men read the Thursday business section," explains Myers.

A Polo user "cares about looking wonderful all the time."

Radio advertising is "very limited" and outdoor advertising not used at all because "it's not our image," says Myers.

The Aramis aroma, for the first time, may be detected in remittance envelopes for department store credit-card bills in a pitch for Father's Day. Aramis also will be peddling a men's traveling case for a PWP on store bills.

Although Aramis still sponsors GWP's and PWP's, including, of course, its famous Aramis umbrella, it is moving away from promotions, as is the entire men's fragrance industry, says Myers.

The 1987 ad budget is "higher than last year," but Myers wouldn't elaborate or comment on LNA's estimate of almost $4 million on Aramis' toiletry expenditures in 1986. Media Records reports that expenditures for Aramis toiletries amounted to $146,133 in 1986.

Polo

Polo's strength in the marketplace stems from its "perfect" embodiment of creator Ralph Lauren's image, that of a "successful designer of clothing and home furnishings," gushes Jane Terker, vice president of marketing, men's division of designer fragrances of Cosmair Inc.

A Polo user is in his 20's or 30's and "cares about quality, is not particularly trendy and cares about looking wonderful," says Terker. This "image of quiet elegance" is one of permanence, "as if you were of a world that's been around a long time."

Polo has been trying to reach beyond its existing department-store customers and last fall tested a combination tv and direct-mail campaign to draw in new customers. Terker reports the exercise was an "enormous success."

"The thought process was, a lot of people hadn't smelled it and may be predisposed to buy it if they did," she reasons. The company targeted by zip code all the homes housing men with annual incomes of at least $25,000 within a 10-mile trading area of spe-

Aramis is trying to expand its market to include younger men with a thinning-hair treatment.

IN RHODE ISLAND YOU CAN TEST SOUP WITHOUT ANY SPILLAGE.

mpbell's
NSED
Tomato
SOUP

A company like Campbell's can't afford to be sloppy in test marketing. And they found a really neat test market in Rhode Island. There's almost no media spillage. It's an ideal demographic cross section of America. And as for cost efficiency, you can reach virtually the entire market through Rhode Island's only major newspaper. At an extremely low CPM.

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The Providence Journal-Bulletin
Put America to the test.
75 Fountain St., Providence, RI 02902

cific stores. They were offered a gift if they came into the stores or purchased through the mail. "Our business has reached new levels in those [test] markets," exclaims Terker, noting that 50% of those who redeemed the mail piece had never before tried Polo. Polo's U.S. retail sales were more than $75 million in 1986, and they are expected to reach $90 million this year.

The direct-mail piece, which contains a scented blotter card, a photo of the Polo line and description of the fragrance and an order form, is being dropped nationally during the spring and fall. Because the direct-mail test was successful "beyond our expectations," about $2 million, or 25% of the media budget, will be used for direct mail.

About $2.5 million is spent on GWP's and PWP's. Less than 15% of Polo's business is tied to the gift products. Terker laughs that the "ubiquitous" green bags have provided many with matched sets of luggage.

Drakkar Noir wants younger customers to "feel the power."

Polo uses 30-second commercials on spot tv in the top 43 markets, except for the Midwest. Ads designed by Geers Gross appear on *20/20* and *60 Minutes* and also *The Cosby Show* and *Miami Vice* to zero in on its target audience of "younger, upscale men." About $4 million will be spent on tv ads, which are done on a co-op basis with department stores. Polo's print budget is about $700,000.

Polo appears in *GQ*, *Vogue*, *Sports Illustrated* and *Esquire*. Terker says about 50% of the media is directed at women because they purchase a large portion of Polo for men. Some outdoor advertising has been done in California, but radio hasn't been "tremendously successful." Terker observes, "It's hard to sell a fragrance that depends so much on the communication of an image. It's tough to get a message across."

LNA reports that about $4.7 million was spent on ad expenditures last year, most of which was in spot tv.

Drakkar Noir

Drakkar Noir, literally translated, means "viking ship night." This obviously means nothing to anybody — except that somebody at Cosmair liked the sound of a men's cologne called Drakkar Noir.

The fragrance hit the shelves in 1984. Last year, U.S. retail sales reached $30 million with net shipments after returns growing 108%, and this year Terker says they are predicting $44 million in sales, or a "conservative sales estimate of 45% growth."

While increased distribution is one reason for burgeoning sales, Terker says Drakkar Noir is presented in a "cohesive story that has broad appeal among the younger customers." Drakkar Noir wearers are instructed to "Feel the Power." They are younger than Polo wearers and may still be high school or college students. To give you an idea, promotional events include Yamaha motor scooter giveaways.

Drakkar also gained increased counter space following the merger of its marketing and sales departments with that of Polo.

High school and college students wear Drakkar Noir. These younger men are more likely to buy their own cologne.

INFLUENCE:

Toledo's newspaper has had a strong community influence for over 150 years.

The Blade is more than a newspaper. It is a community institution . . . investing itself in the economic, cultural and political life . . . working to set priorities . . . sparking ideas . . . using its influence to help great things happen.

Dana Corporation's rise to 103rd place in the Fortune 500 is a noteworthy achievement for the Toledo-based corporation. It is also further evidence of Toledo's vitality.

This vitality is reflected in the transformation of Toledo's downtown skyline with 7 new buildings, an effort more than three quarters financed by private interests.

The Blade's strong influence makes it an effective catalyst for community achievement. It's an influence we share with advertisers in our 14-county market. 3-county Metro area Sunday coverage 82%; 3-county Metro area daily coverage 67%.

Dana Corporation's world headquarters, located in Toledo.

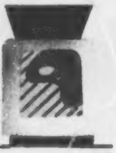
THE BLADE
One Of America's Great Newspapers

541 Superior St., Toledo, OH 43660

Tv commercials may be seen on *Family Ties*, *Miami Vice* and *Moonlighting*. About $3 million was put toward Drakkar's tv ads, which, like Polo's, are purchased on a co-op basis with stores. Terker notes that the print advertising and general-readership magazine ads are more male-oriented than those of Polo. This is because Drakkar is purchased more by men than women, the reason being that younger consumers shop for themselves. About $1 million is spent on print ads. Books include *Rolling Stone*, *Sports Illustrated*, *Time*, *Esquire* and *Cosmopolitan*. Newspapers are used on a limited basis for specific markets, while a few "small space ads" have been in the *Wall Street Journal*. A few markets in the South and in Chicago are used for radio advertising.

Terker claims Drakkar uses less GWP's and PWP's than other fragrances, but currently there are Swiss Army knives available as well as beach towels and thermoses. The promotional products have about a $1.5 million budget. McCann-Erickson is the ad agency.

Obsession for Men avoids competition by using a pre-sell campaign to take over and "own" the stores before the holiday onslaughts.



LNA reports that about $2.1 million was spent on spot tv and magazine ads last year.

Obesession for Men

Just as it did with its women's scent, Obsession for Men by Calvin Klein is pitched in ads designed to widen the viewer's eyes and make the mouth go agape: Naked bodies are everywhere.

"The advertising by its very nature is quite graphic," says Laura Lee Miller, director of marketing, men's fragrances, at Calvin Klein Cosmetics Corp. "It is quite exciting in creative execution and attracts a lot of attention, which is what advertising is all about." Miller wouldn't pigeonhole the target audience of Obsession for Men, which has "overtones of musk and spices," except to say it appeals to "every man" from age 16 to 76.

The Calvin Klein strategy, says Miller, is to use a "pre-sell campaign." The ads for Obsession for Men broke in April 1986, four months before a drop hit the stores. Miller explains that the strategy builds consumer awareness and demand. The print ads featured scent strips. Its three tv commercials are 10-, 15- and 30-second lengths and may appear on most of the 8-to-11 p.m. prime time shows on the three networks, along with *60 Minutes* and mini-series, as well as *The Tonight Show* and Fox Broadcasting's *The Late Show*. Magazines used include *Vogue*, *Cosmopolitan*, *Mademoiselle*, *Harper's Bazaar*, *GQ*, *M*, *Esquire*, *Playboy*, *Connoisseur*, *Vanity Fair* and *House & Garden*.

Gifts-with-purchase are done twice a year, during April and May to generate sales for Father's Day and during September and October for Christmas. The pre-sell idea is used during those months to avoid the competition that occurs closer to the holidays. "We concentrate on 'owning' the store and merchandising the product with banners, tablecloths, free-standing tables and pedestals," says Miller.

The same pre-sell strategy is coming up for five new body products due out in the fall. Ads will appear in August magazines that hit the stands in mid-July.

Miller wouldn't comment on a reported $17 million in advertising and promotion for Obsession for Men, except to say there is a "heavy investment" in both advertising and promotions. "It's significantly higher than most of our competitors," she admits. C.R.K. is the in-house advertising agency.

LNA reports that almost $4 million was spent on advertising for the product last year. ■

"Hey, Marge, meet the Huxleys.
They're NOT from Orange County!"

One quarter of a million (244,900) Orange County residents traveled overseas last year. (Simmons-Scarborough 1985 Market Study)

THE ORANGE COUNTY
Register
METROGROUP

The leading medium in Southern California's richest market. Represented by CWO&O

TOOLS OF THE TRADE

by Wally Wood

EXPOSING THE POSSIBILITIES

You've been hearing it for years: The art of magazine evaluation must move beyond circulation and total audience counts. Among the new measures that are gaining credence is Mediamark Research Inc.'s magazine page exposure system, but many remain in the dark about just what to do with this qualitative data. Kraft Inc. set out to find some answers by making magazine page exposure (MPX) an integral part of its media planning.

The Kraft decision, says Jack Hanrahan, a vice president and media director at Leo Burnett, is an attempt to get closer to establishing the value a brand receives for its ad dollars.

Bill Landgraf, manager of advertising services at Kraft, believes that many people plan magazine schedules by rote. "We have become so accustomed to looking at average issue audience estimates that we tend to forget these are in no way direct measurements of actual advertising exposure."

Average issue audience figures don't measure advertising exposure because some readers don't open a given page. Others may look at an issue on several different days and thereby be exposed to a given ad more than once.

This means that *all* average issue audience estimates from both Simmons Market Research Bureau (SMRB) and Mediamark Research Inc. (MRI) overestimate advertising effect.

Average issue audience figures may underestimate these figures, and, in any event, do not tell the number of different days that, on average, an ad page will be exposed to readers.

In the 1960's, Alfred Politz carried out repeat exposure studies and found not only that some readers open an issue more than once, but that advertising effectiveness increases dramatically with multiple exposures.

KEVIN HORAN

Hanrahan (left) and Landgraf take a second look at magazines.

Politz last measured "Advertising Page Exposure," or APX, in the company's syndicated audience study in 1966. The average for the 12 magazines was 1.8; that is, the average reader opened the average page 1.8 times during the "life" (seven days/weekly, 30 days/monthly) of an issue.

APX never became a media planning tool because it was available for too few magazines. Sixteen years later, in 1982, the Magazine Publishers Association studied 30 publications and obtained figures similar to Politz.

Timothy Joyce, the chairman of MRI, later realized his service could calculate an MPX score for all the publications in his survey. And while MRI's methodology differs from the others, the results are strikingly similar:

COMPARISON BETWEEN POLITZ, MPA AND MRI DATA

	Politz	MPA	MRI
Reading days	N/A	3.2	3.1
Pages opened per avg. day	N/A	54%	54%
Page exposure score	1.8	1.7	1.8

Source: Mediamark Research Inc.

Interestingly, a group of British magazine publishers has initiated an MPX study covering 110 publications. The British study, using the same measurement technique MRI uses, came out with an MPX of 1.8 as well.

Kraft's Landgraf says that he became interested in magazine page exposures more than a year ago when he was looking at magazine performance among margarine users and barbecue-sauce users. This led him to look at primary/secondary figures. He reports, "There seemed to be some differences in primary and secondary readers among the various publications, and while we thought the figures made a lot of sense, we ran into a snag because of a definition problem: What is a primary reader?"

Most media people consider a primary reader to be someone who actually bought the magazine, but MRI includes as a primary reader someone who lives in the same household as a purchaser. "So there was a definition problem in how the data is collected and what it reflects," says Landgraf.

In addition to the primary/secondary reader question, Landgraf considered the value of in-home versus out-of-home readers. He concluded that although Kraft agencies could use the in-home/out-of-home audience data in planning media, this is really an element of the brand's creative strategy. If, for example, the strategy is to include a coupon or recipe in the ad, then the agency should give greater weight to in-home readers and less to out-of-home. Conversely, if the ad is simply a reminder, the agency should give somewhat more weight to out-of-home readers.

But since there was no general agreement among Kraft's agencies over the value of primary versus secondary readers or in-home versus out-of-home, Landgraf and Burnett's Hanrahan looked at page exposure as a way "to provide a meaningful measure of potential ad exposure against specific brand target audiences."

Hanrahan says, "We felt that MPX related to advertising effectiveness. There had been a number of studies such as Politz where a value had been demonstrated for the second exposure relative to the first on characteristics such as brand familiarity, belief in the claims, etc." And as Landgraf points out, "A magazine schedule comprised of books delivering more repeat exposures for the same money has to be more cost-effective than a schedule that doesn't provide as much repeat impact."

Landgraf and Hanrahan found that MPX scores *did* discriminate within and across vehicles by type of reader. They looked at how well MPX scores discriminated against primary readers versus secondary readers, and in-home vs. out-of-home "and there seemed to be the kind of results one would expect intuitively, with primary readers having much higher MPX scores than secondary, and in-home much higher than out-of-home."

According to MRI, primary readers have an average MPX score of 2.2; secondary readers have an average of 1.2. In-home readers have an average of 2.2; out-of-home readers, 1.1. Also, the more time a reader spends with his or her magazine, the higher the MPX score; those who spend 15 minutes or less have an average MPX score of 0.9; those who spend four hours or more have 6.5.

And they found that it was easy to incorporate MPX data into the vehicle selection process. Various computer evaluation programs are available on IMS and MSA.

So what happened to the magazine rankings (primarily women's books and major dual audience publications) when they did so?

The changes were subtle, admits Hanrahan. "The biggest drop or jump was two places. Most publications either stayed in the same place, shifted by one place, or, in a couple of instances, moved by two places when weighted by product usage."

That may sound small, but Hanrahan points out that small changes in the rankings may mean the difference in deciding if a publication makes it onto the schedule. Also, while not changing the rankings, the MPX scores change the index relationship between the highest cost-per-thousand magazine and the lowest, which can be significant.

Landgraf underscores that MPX is only one factor in their selection of magazines. Others include positioning; how the publisher has treated Kraft ads in the past; the vitality of the magazine's circulation; and more. Kraft links the MRI data with product and category usage data by marketing weights so that a brand manager can decide whether to target heavy users or medium users. The manager, for example, may decide not to reach heavy users because other cross tabs indicate that heavy users in a given product category have little brand loyalty. They buy pounds of the product, but they buy on price, or on deals with coupons. So the brand manager may target the advertising disproportionately to medium and light users.

Kraft set out to test the value and viability of page-exposure data in magazine schedule planning.

"We've looked at MPX not in how it changes individual magazines, but the bottom-line effect it can have in terms of optimizing schedules," says Landgraf. "The importance isn't the position of Magazine A versus Magazine B, but the effect on the schedule. It can get you closer to what we're really after, which is the value received for the money invested — the advertising exposures."

SENDAWAYS

A new international survey reveals what some of us may have been suspecting all along: European consumers respond only tepidly to American products. In comparison with West German and Japanese products, the survey by International Research Associates, a subsidiary of Starch INRA Hooper Inc., shows goods bearing the "Made in the USA" label are perceived as decidedly inferior and only about equal in quality to French ones.

The image of American-made products is poorest in West Germany. To be fair, however, the Germans have low opinions of products made in any country but their own, with the exception of some grudging respect for Japan, says the report. Findings are based on face-to-face interviews conducted with 5,912 people in six countries: West Germany, France, Italy, United Kingdom, Belgium and Norway.

The report also notes that the European consumers with the highest regard for American products are the Italians and the French. More than a third of all Italians, and a quarter of the French, think that "Made in the USA" is a good label.

Unlike most Europeans, American consumers have a very positive perception of the quality of American-made products. At the same time that research was underway in Europe via International Research Associates, research on this question was conducted in the U.S. by the Roper Organization, also a division of Starch. A representative nationwide sample of 992 adult Americans was interviewed.

Fully 69% of Americans in this respondent group believe the label "Made in the USA" is a mark of quality — compared to merely 18% of Western Europeans.

For further results or more information about the research, contact Gunilla Broadbent at Starch INRA Hooper, Mamaroneck, N.Y.

POINT/COUNTERPOINT/

THE WORLDLY VIEW

THINKING GLOBAL

My colleagues at Saatchi & Saatchi in London like to think they came up with the first television commercial that was truly global, a now-famous 1983 spot for British Airways in which the island of Manhattan appears to land at Heathrow Airport.

That ad has run in 40 countries and in six languages. Syndicated research found that it helped double the number of people who mentioned British Airways advertising without prompting. And British Airways' summer bookings on the North Atlantic were up 40% over the year before.

There is a reason the same commercial can speak to people in 40 different countries: The nations of the industrialized world are starting to converge in a number of important ways.

Birth rates are falling. The nuclear family is declining. Productivity is rising. The work week is becoming shorter and leisure time longer. Perhaps most important of all, television and motion pictures are creating a worldwide popular culture. Our British Airways commercial would hardly have had the same impact if it weren't for such movies as *E.T* and *Close Encounters of the Third Kind.*

At the same time, a few powerful factors have been at work in the marketplace. Because populations aren't growing much, markets have become static. This means more intense competition for market share. As the benefits of technology spread far and wide, product quality is converging. A marketer who enjoys a technological edge over the competition probably won't enjoy it for long. And as manufacturers respond to the ever-higher cost of trying to reach the consumer, marketing expenses are soaring.

All this has meant that markets for goods and services are more competitive, and that products cannot survive without controlling costs. As far as advertising is concerned, that means taking advantage of the economies of scale that a world brand can bring.

We think it's exciting that world branding — the notion of organizing a firm's marketing efforts along global lines — is replacing the older country-by-country approach. And it's more ambitious, more efficient and more effective than anything we've seen.

Robert O. Jordan is chairman of Saatchi & Saatchi Compton Inc.

OUR READERS TELL US. . .

Though hardly universal, more than half of our advertiser sample indicates that global marketing is integral to their overall strategies. Polling was conducted by Research USA, Chicago. (Base: 93)

1. Do you believe global marketing — using one campaign with slight modifications to sell a product around the world — is a viable idea?

Yes	51.6%
No	47.3%
No answer	1.1%

2. If "Yes," has your firm switched, or thought about switching, its business to an agency that is more closely aligned with the global marketing concept? (Base: 48)

Yes, we have switched	25.0%
Yes, we are thinking about it	12.5%
No	62.5%

3. Is your firm doing more multinational selling today than it was three years ago?

Yes	54.9%
No	11.8%
About the same	20.4%
Not doing any	12.9%

If "Yes," where is it selling more?
(Base: 51)

Canada	62.7%
Mexico/Central America	49.0%
South America	31.3%
Great Britain	52.9%
Western Europe	64.7%
Eastern Europe	—
Asia/Japan	56.9%
Africa	5.9%
Australia/New Zealand	54.9%

4. Is your firm spending more or less on multinational advertising this year compared to 1986?
(Base: 21)

More	22.6%
Less	1.1%
About the same	44.1%
Not doing any	32.2%

If "more," how much more?

5% or less	9.5%
6%-10%	47.6%
11%-15%	9.5%
Over 15%	28.6%
Don't Know	4.8%

5. If your firm is presently selling in Europe, please indicate which of the following media are most important in terms of usage? (Base: 58)

Magazines	56.9%

POLL

ACTING LOCAL

Global marketing is a fact, not a debate.

The debate is how to market best — that is, how to combine global marketing with local execution. We know that global marketing works; indeed, it is the most significant business development since World War II. The question is how to balance global marketing with local accountability.

The answer is, "Think global. Act local."

By "think global," we mean focusing first on global commonalities and the power that comes from sharing global information and learning. Successful marketers recognize the benefits of global experience — that a trend in one country, for example, may suggest new developments in another. Successful marketers know that basic consumer wants are universal.

"Act local" means that, despite global commonalities, every sale remains a local sale. Relevant local differences do matter, and opportunities vary by market. Local competitive conditions, local problems and cultural biases must be recognized and exploited.

"Think global. Act local," does not mean that every country is the same. It means that commonalities often are more important than differences, and that differences, when they exist, are acknowledged and acted upon.

"Think global. Act local," is not a policy of global homogenization nor one of global suffocation. It is a policy of global harmonization. The local manager is encouraged not only to "think global," but to challenge the status quo, to test new ideas and to prove that the global benchmark can be beaten by a superior local approach.

While the power of global marketing is compelling in theory, it is even more dramatic in execution.

Our work at Ted Bates for Kal Kan canned dog food illustrates how effective global campaigns can be, and how valuable knowledge transfer is on an international scale.

Kal Kan's premium-priced product is the market leader outside the United States, based largely on a highly successful program of endorsements by top breeders. We're in the process of adapting that campaign for the U.S. market, and supporting that advertising with other local marketing elements such as direct mail, special events, packaging redesign and even an interactive computer program to match dog breeds with potential owners.

We think global, recognizing the international validity of breeder endorsements. We act local, customizing the breeder affiliation to reflect what works best in the U.S.

There are numerous other examples of global marketing success. What automotive marketers discovered to their dismay, domestic beer marketers are learning: U.S. companies cannot ignore global competition. First the Europeans, then the Canadians and now the Australians' beer (Foster's, in this case) is succeeding in America.

Estee Lauder revolutionized global cosmetic marketing. Seiko successfully captured global leadership in watches. The battle of beverages is now a global battle. And the fast-food war has crossed all borders.

Xerox, IBM and Apple are global brand properties. Nissan, Benson & Hedges and Avis compete in a world marketplace. So do Buitoni, Air New Zealand, M&M's, Panasonic, DHL, Oil of Olay and so on.

Global marketing exists because it is a competitive advantage. Global advertising agencies exist for the same reason.

A global agency can be stronger than an unaffiliated local agency because its integrated network with worldwide information systems, coordinated planning, consistent disciplines and sharing of learning on an international scale are powerful tools.

There are some who deny these principles and business developments. They look back instead of ahead.

But the global world is an increasing, undeniable reality. Companies that take advantage of the global world — who embrace global marketing — will defeat those who hang onto old-fashioned views and out-of-date ideas.

Larry Light is chief executive officer of Ted Bates International.

Broadcast tv	51.7%
Satellite-delivered tv	12.1%
Outdoor	13.8%
Radio	3.4%
Newspapers	43.1%

6. Do you think global marketing is more appropriate for corporate image campaigns or for brands?

Corporate image	23.7%
Brands	29.0%
Both equally	39.8%
No answer	7.5%

7. Which type of agency are you more likely to work with overseas?

Independent, locally owned	28.0%
Autonomous offshoot of a U.S. agency	11.8%
Owned-and-operated office of a U.S. agency	44.1%
No answer/don't know	16.1%

SALES PROMOTION

by Russ Bowman

THE YEAR IN REVIEW: PART I

1986 was spectacular for sales promotion as expenditures passed the $100 billion mark. And while a decade ago other big cities like Philadelphia and Washington shared the spotlight with the "Big Apple," 1986 was decidedly a very New York year.

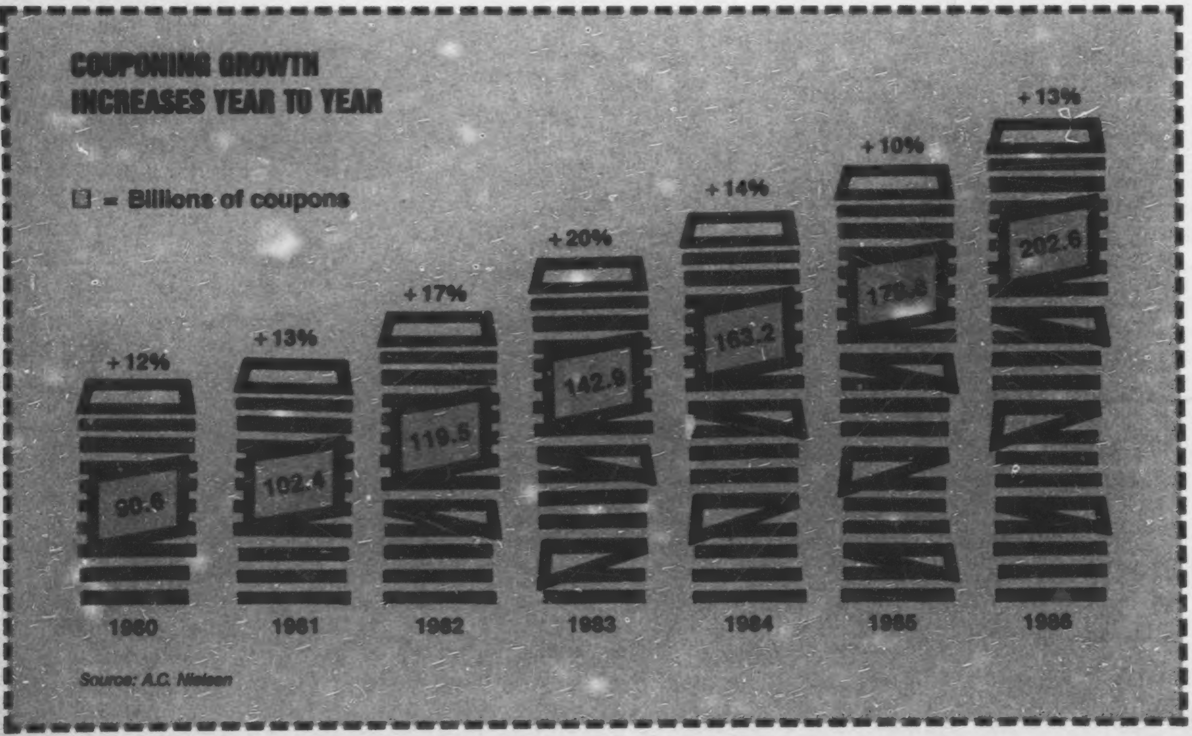
As the year began, the excitement was building for the big unveiling of Lady Liberty, and many companies were involved with multi-million dollar promotional sponsorships. As the summer progressed, it became apparent that those brands and companies sponsoring the New York Mets had gambled on a winner, and, sure enough, the good old Mets came through. Then, for NYC's second miracle, they sent their old faithful Giants off to the Super Bowl . . . and New York won that too!

The sales promotional winner of the Super Bowl would clearly be Quaker Oats' Gatorade. Several minutes of fooling and dousing Bill Parcells gave Gatorade some very valuable free tv camera shots, especially with 120 million people watching and the rest of the brands paying about $600,000 for half a minute. Word has it Gatorade, which generally experiences a slow season in January, was out of stock in many stores by Monday afternoon.

As the year ended, the promotion focus shifted from the stadiums to the water and the Americas Cup Challenge. Many big brands were happy to promote through sponsorship of American sailboats, and, in the end, Pepsi's and Dennis Connors' *Stars & Stripes* beat the Australians and brought back the Cup to America.

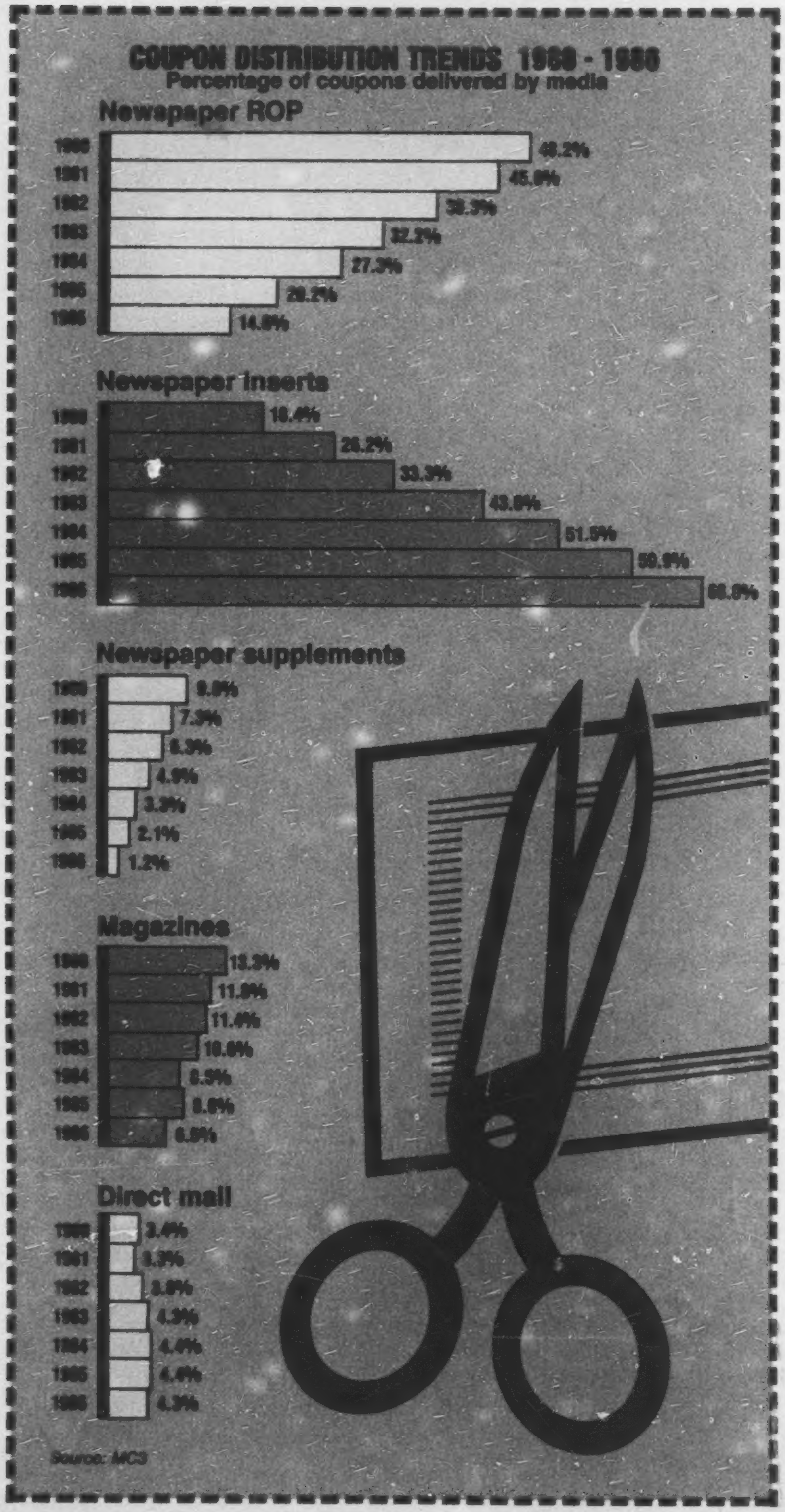
Marketing services and brands that made news in 1986: In the promotion world, '86 was a big year for the service companies that are representative of the industry. As the year began, one could see the promotion industry was ready to join the trend with the rest of corporate America toward mergers and buyouts. At the beginning of the year, Quad Graphics of Milwaukee bought out the then-ailing Blair Marketing, and Quad also became a sponsor of one of the U.S. boats that went to Australia.

But the big '86 news in promotion didn't happen in New York. It was more of an international affair among MCA in Westport, Conn., which sold its newspaper ROP co-op and insert division to Valassis in Detroit, Michigan, which in turn sold out to Kerry Packer, an Australian in Perth. It could be that the next major race between the Australians and Americans will not be



Source: A.C. Nielsen

SALES PROMOTION



Source: MC3

on the water but in the free-standing-inserts business.

The direct mail co-op business also changed in '86. For the first time in nearly 20 years, a one-company business now has three players, and the future will be more of a tri-state competition among Larry Tucker in New Jersey, Metro Mail in New York and Donnelley in Connecticut.

A few companies made news that is relevant to the promotion business in 1986. Campbell Soup was the first company to plot a major move toward regional marketing, with marketing responsibility and $1 million ad/promotion budgets assigned to 16 regional offices. In the perceived battle between ad and promotion budgets, this will be an interesting development to watch because Campbell has always been a believer in promotion as a tool that builds brand image.

The next major company to test regional marketing was General Foods, which set aside Denver to experiment with local strategies.

Over in the cola wars, Coke is once again out ahead. With a 40% share vs. a 30% share for Pepsi, many marketers sight their different philosophies as a major contributing factor. Coke has used promotion to build the brand image and to move more cases. With a display in a Safeway in Virginia, Coke moved over 2,000 cases in a three-day weekend. Pepsi, on the other hand, has put great faith in big budget tv spots with top personalities.

Another success of '86 through both advertising and promotion was the duo of Ed Bartles and Frank Jaymes. The latest ploys include Bartles & Jaymes watches and posters. They also offer displays that retailers love and restaurant promotions.

It has all paid off. They jumped in the emerging wine cooler category and got first place with a 20% share in less than a year. One restaurant promotion involves a life-size cut out of Ed & Frank that the field promotion people bring to take Polaroids of customers.

SALES PROMOTION

It seems crazy, but people line up for a picture with the cut out.

Shifting trends in the key segments: The trends in tv continue: Advertising on the three networks reaches a smaller audience every year — it's now less than 73%. Meanwhile, the cost of commercial time goes up. While the cost per thousand of the key advertising media (tv, newspapers, magazines) keeps going up, the CPM of promotional media like free-standing inserts has been going down. (see "Sales Promotion," August 1986).

Point-of-purchase sees big gains: The Point-of-Purchase Advertising Institute (POPAI) made news with an update of their POPAI/DuPont study showing 81% of brand purchase decisions are made in the store. That's a significant increase from the 65% reported in POPAI's last study in 1977.

As a result of this and other factors, the point-of-sale area has gained even greater strides than other promotional techniques, up about 20% in '86 over '85, according to POPAI. Industries with the greatest P-O-P increases are transportation, food and beverage and health and beauty aids. In the future, contracted P-O-P like Actmedia's cart and shelf signs in supermarkets and POP Radio's in-store commercials in 7,000 drug stores will greatly add to the shifting growth.

Premiums show only modest gain: Use of premiums and incentives in promotion shows a declining growth pattern. It is difficult to get a good fix on the size and the trends in this industry, in part because the two major trade publications that issue annual reports differ dramatically. *Premium & Incentive Business* puts the 1986 state of the industry at $21 billion with 5.3% growth, while *Incentive Marketing* claims the business is only $13.1 billion, a 2.9% growth over the previous year. The one category of incentives that does appear to be on the rise is sweepstakes and games. Ventura Associates estimates sweepstakes are growing at 20-30% a year. The hottest techniques are instant winner games and automatic entry coupons.

COSTING OUT INCENTIVES

	1986 EXPENDITURES (000)	% CHANGE	1985 EXPENDITURES (000)	% CHANGE
SALES INCENTIVES	$3,484,645	6.7	$3,264,679	9.4
Merchandise	2,628,691	6.5	2,468,214	9.2
Travel	855,954	7.5	796,465	10.1
DEALER INCENTIVES	$2,346,799	5.3	$2,228,063	8.9
Merchandise	1,532,474	5.2	1,456,672	8.3
Travel	814,325	5.6	771,391	10.2
TRADE TOTAL	$5,831,444	6.2	$5,492,742	9.2
BUSINESS GIFTS	$1,211,722	2.7	$1,179,502	5.1
CONSUMER PREMIUMS				
Product Promotion:	$3,685,931	1.6	$3,629,492	8.3
• Mail-in Offers	1,864,186	2.0	1,827,436	7.5
• Direct Premiums	1,821,745	1.1	1,802,056	9.1
Retail Promotion:	$2,411,000	−2.3	$2,468,500	6.1
• Trading Stamps	456,000	−12.6	522,000	−5.8
• Other Retail Premiums	1,955,000	0.4	1,946,500	9.8
CONSUMER TOTAL	$6,096,931	–	$6,097,992	7.4
TOTAL USAGE	$13,140,097	2.9	$12,770,236	7.9

Source: Incentive Marketing

Couponing: a cautious, but upward trend: Following a period of much talk about clutter and two years of declining growth, coupon trends bounced back with a 13% gain in 1986.

Using coupons, consumers saved a total of $2.75 billion on their shopping bills in 1986. This is an increase of 23% over the $2.24 billion saved in 1985 through use of coupons. In addition, retailers received $586 million for the handling allowance for coupons redeemed in 1986. A record 202.6 billion coupons were distributed by manufacturers in 1986, up 13% over the 1985 distribution of 179.8 billion.

MOVING? Send us your new address NOW

Our computer takes six to eight weeks to re-route your copies of MARKETING & MEDIA DECISIONS.

Mail this now and keep DECISIONS coming!

Paste your present label here.

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Title ....
Company ....
Address ....
....

Mail to
DECISIONS PUBLICATIONS, INC.
1140 Avenue of the Americas
New York, NY 10036

ECONOMIC EYE

COMMERCIAL BREAK

The Television Information Office (TIO) of Roper reports that 57% of their 2,000-person sample in 1986 acknowledged tv as a main source of product information. Newspapers ranked second with 24%, magazines third with 16% and radio last with 5%. A full 75% agreed commercials are a fair price for free tv.

MAGAZINE AD SCORECARD	Ad Pages April 1987	% change from April 1986	Dollars spent (000)	% change from April 1986
1. Skin care, Creams, Lotions and Oils	193.45	+21.48%	$ 5,824.1	+24.94%
2. Lip and Eye Beauty Products	107.31	+10.69	3,685.0	+2.90
3. Scents and Fragrances	218.81	+3.83	6,036.0	+14.85
4. Facial Makeup Products	103.56	+42.19	2,967.6	+13.65
5. Prepared Dinners and Entrees (including Pizza)	41.67	+56.60	2,095.6	+13.37
6. Liquor	236.67	−30.77	10,511.3	−23.44
7. Cigarettes	660.37	−14.70	32,597.1	−17.36
8. Soaps and Detergents	39.99	−16.49	2,263.3	−29.29
9. Passenger Cars, Domestic	457.20	+18.19	24,073.7	+24.09
10. Passenger Cars, Imported	494.56	+5.54	22,821.2	+9.01

Source: Publishers Information Bureau as prepared by Leading National Advertisers

MEDIA COST INDEX

1985 = 100	1986												1987			
	July	% change	Aug.	% change	Sept.	% change	Oct.	% change	Nov.	% change	Dec.	% change	Jan.	% change	Feb.	% change
Network TV																
Daytime	102	+2	95	−5	102	+2	103	+3	98	−2	85	−15	106	[illegible]	105	[illegible]
Nighttime	107	+7	108	+8	107	+7	104	+4	107	+7	109	+9	92	[illegible]	86	[illegible]
Spot TV																
Prime time	126	+26	121	+21	105	+5	119	+19	115	+15	116	+16	—	[illegible]	—	[illegible]
Daytime	113	+13	109	+9	99	−1	109	+9	111	+11	105	+5	—	[illegible]	—	[illegible]
Network radio	104	+4	105	+5	104	+4	115	+15	106	+6	101	+1	139	[illegible]	130	[illegible]
Spot radio	←	←	98	−2	→	→	←	←	103	+3	→	→	—	[illegible]	—	[illegible]
Consumer magazines	105	+5	105	+5	106	+6	106	+6	106	+6	107	+7	109	[illegible]	109	[illegible]
Natl. Sunday mags	96	−4	105	+5	105	+5	94	−6	94	−6	94	−6	103	[illegible]	103	[illegible]
Business publications	106	+6	106	+6	106	+6	106	+6	107	+7	107	+7	111	[illegible]	111	[illegible]
Newspapers	108	+8	108	+8	108	+8	108	+8	109	+9	109	+9	116	[illegible]	116	[illegible]
Outdoor	107	+7	107	+7	111	+11	106	+6	106	+6	106	+6	111	[illegible]	111	[illegible]

Notes: Percentage shown is relative change from the same month/period the year before.

1985 = 100 *revised

Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cov. 1, pgs. 2, 3, 44A, 45,
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JULY

1987

C2950-3
7/17/87

MARKETING & MEDIA
DECISIONS

JULY 1987 • $4.00

HIT THE ROAD

That's the cry at lots of companies and agencies as marketers revamp national strategies to focus on regional opportunities.

READY FOR MAGAZINE BUYING GROUPS?

SPECIAL REPORT: THE TOP 200

ConAgra's Kennedy (left) and DMB&B's DeWees map out a local strategy

*************** 5-DIGIT 20814
711 00161861 41 93
GREG CHRIS
CONGRESSIONAL INF SVC DIR
4520 EAST-WEST HWY #800
BETHSEDA MD 20814

MARKETING & MEDIA DECISIONS

COVER REPORT

ONE NATION, DIVISIBLE 118

The concept behind global thinking is being shattered to pieces by the latest movement in marketing: regionalism. While there are still plenty of caution lights along the way, marketers are hitting the road in search of local color for their product pitches.

IN FIRST GEAR 126

There is no doubt about it: The regional trail is being cut from the client side. It's not that agencies aren't interested; it's just they are going to wait until the dust settles before they make any substantial changes.

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WHEN PRICE COMES FIRST 36

Lee Press-On Nails demonstrate that quality comes second in tv buys. Quantity at the right price put a shine on this product's sales. And what a price!

TIME MARCHES ON 40

Time Inc. magazine division's no-nonsense leader, Reginald Brack, has enlisted media directors in his planning.

THE TOP 200

THE TOP BRANDS OF 1986 45

Once again, *Decisions* compiles the definitive ranking of the top-spending products and services of the past year according to a host of sources. Included in this annual report are the top ten advertising product or service categories, plus the top five parent companies in each group (page 47); an alphabetical index to the Top 200 (page 50); and individual listings for the ranked entries (beginning page 54).

Each entry breaks the advertising spending for the year into nine media categories. The listings also supply the parent companies, the marketing/brand management team at the parent, the agency or agencies and the principal agency contacts.

DEPARTMENTS

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Joe Ostrow makes the big leap after more than 30 years at Young & Rubicam, and Steve Fajen crosses the line into buying service territory.

LETTERS 8

Considering the creative question, and some updated info on past features.

DEBUT 10

The second annual guide of magazine launches, this one for 1986, shows no lack of the good, the bad and the ugly — not to mention a few you can't bring up in polite company.

PRINT BEAT 17

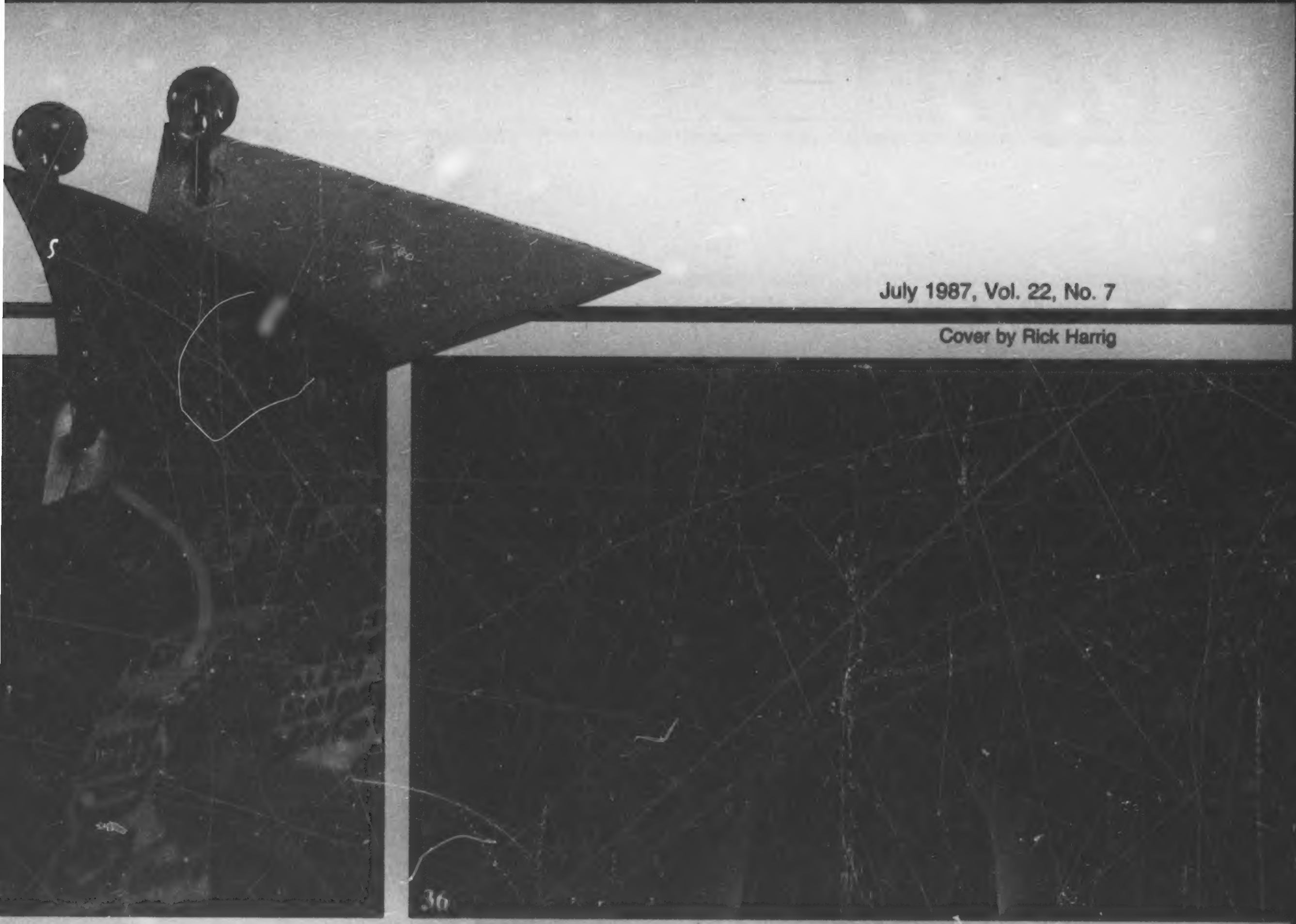
Faced with one open rate card, agencies talk of devising negotiating ploys and demanding greater circulation disclosure.

DIRECT MARKETING 20

L.L. Bean has gotten back to basics, and its sales increases have gotten back to the double-digit percent range. Also, computers are being used to identify the direct mail prospects most likely to go bankrupt.

CREATIVE CONCEPTS 24

While hardly the innovative haven many expected, cable still attracts some novel approaches from creative advertisers like Anheuser-Busch, General Foods and Procter & Gamble.



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Cover by Rick Harrig

FREEZE FRAME 26

Nickelodeon is coming of age as a prime kids outlet. At *Business Week*, future home video ventures will have something extra: sponsors.

TOOLS OF THE TRADE 140

Chilton takes a look back to track the effect of multiple-page exposures in magazines for b-to-b.

BROADCAST BEAT 143

This month, CBN will debut "prommercials" — 15-second promo spots with 15-second local ad adjacencies.

POINT/COUNTERPOINT/POLL 146

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ON THE DOCKET 148

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SALES PROMOTION 152

Part II of Russ Bowman's annual report for 1986 on the sales promotion industry outlines exactly where the ad dollars end and promotion dollars begin in the total marketing picture.

ECONOMIC EYE 156

The Media Cost Index moves ahead. Also, a snapshot of category ad investments in magazines.

LAST WORD 160

Kent Lancaster of the University of Illinois boldly states that media planners are the key to forecasting the future.

AS THEY SEE IT

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If at first the answer seems obvious, think, think again.

NEWSPAPERS *Frank Hajek* 132

Like the rest of the media world, change is begetting change as the venerable medium tests new ways of doing business.

TELEVISION *Cheryl Kroyer* 133

Not every client benefits from a purely price-driven buy. Clients should know the options.

MAGAZINES *Doug Hochstadt* 136

The key to proper magazine planning is to remember that magazine reading is an active process.

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MARKETING & MEDIA
DECISIONS

TOP 200

BRANDS

PRODUCTS & SERVICES

THE TOP SPIN

This year's Top 200 Brands Directory is the sixteenth annual installment in our continuing effort to supply the most exact breakdown of product-specific ad spending estimates. In the following pages, we report the top ten advertising categories for 1986 (as defined by Leading National Advertisers), plus the top five parent companies in each of these categories. Then the body of the report goes one step further. We have isolated individual products and services to tell the story of exactly who spent what and where in the battle for consumer attention, while also supplying a complete, up-to-date roster of the people directly involved in making those spending decisions.

Here's how it works: Rather than totaling all Coca-Cola soft drinks under the Coca-Cola name, you will find individual entries for flagship Coca-Cola and Diet Coke. And General Motors' spending is segmented into the dollars supporting the most-advertised makes' models or dealer units.

Because of the way this report was organized, new products or campaigns may not have comparable 1985 figures. Hyundai Excel, for example, is included in the 1986 ranking, but, because it was just introduced in the U.S. last year, it obviously has no comparable data for 1985.

For each entry, we report ad expenditures in nine media — network tv, spot tv, cable tv networks, newspapers, consumer magazines, national Sunday magazines, network radio, spot radio and outdoor — and the key media decision-makers at the immediate parent company and its agency or agencies.

In the majority of cases, we were able to match the data from the contributing measurement services — Leading National Advertisers (LNA), Publishers Information Bureau (PIB), Broadcast Advertisers Reports (BAR), Media Records, Inc., the Institute of Outdoor Advertising, Radio Expenditure Reports (RER) and our own *Decisions* estimates. In a few cases, determining spending for such specific entries required adjusting data to make sure we had an apples-to-apples comparison. Therefore, when Media Records reported an overall total for Nissan vs. LNA's breakouts by models, we determined each model's share of overall Nissan spending as reported by LNA. We then applied this percentage to the Media Records total to arrive at a newspaper estimate. Keep in mind that Media Records does not measure newspaper spending for retail, restaurants or financial services.

It should also be noted that due to the specific nature of our ranking, joint ads promoting two or more different products are presented separately from the solo-product reports.

When no directly comparable data could be determined year-to-year, we have either adjusted or excluded the data. These few cases are identified with asterisks.

The result of these efforts is the most detailed report of its kind, giving the full scorecard on the heaviest spending individual branded products or services. Following the top ten categories is an alphabetical index to those individual products or services that qualified. This is your guide to all you need to know about 1986's big spenders, including parent company, dollars invested by medium, total ad dollars for 1986 vs. 1985, marketing and brand management teams at the parent and personnel at the principal agencies representing the brand.

A warm thanks to all of you who contributed information to this most valuable of working tools. ■

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1986 TOP TEN ADVERTISING CATEGORIES AND THEIR TOP FIVE CORPORATE SPENDERS

	Nine-media total (000)	BAR Network television (000)	BAR Spot television (000)	BAR Network cable (000)	BAR network radio (000)	RER Spot radio (000)	PIB Magazines (000)	PIB Sunday magazines (000)	MEDIA RECORDS Newspapers (000)	LNA Outdoor (000)
1. Car dealers & services (including used cars)										
1986	$1,309,492	—	$751,557	$ 63	$ 75	$ 31,350*	$ 387	$ 126	$487,081	$ 38,853
1985	934,673	—	571,517	225	2	28,224	792	378	304,194	29,341
1. General Motors Corp. Dealers Association										
1986	169,676	—	147,721	—	75	6,245	—	—	15,541	94
1985	151,829	—	131,200	—	2	4,497	24	—	15,286	820
2. Ford Auto Dealers Association										
1986	82,088	—	61,233	—	—	9,765	27	—	8,854	2,209
1985	58,799	—	39,714	—	—	8,532	2	—	8,612	1,939
3. Chrysler Corp.										
1986	69,314	—	35,544	—	—	5,586	—	—	27,065	1,119
1985	68,746	—	31,368	—	—	7,600	48	—	28,800	930
4. Nissan Auto Dealers Association										
1986	49,322	—	48,141	—	—	281	—	—	886	14
1985	48,930	—	46,826	—	—	435	—	—	1,662	7
5. Toyota Auto Dealers Association										
1986	40,643	—	36,587	—	—	3,166	—	—	884	6
1985	10,783	—	7,854	—	—	2,497	—	—	429	3
2. Restaurants, hotel dining & night clubs										
1986	$1,295,215	$441,613	$732,433	$ 5,557	$ 357	$ 75,620	$ 8,409	$ 746	—	$ 30,480
1985	1,219,454	421,264	658,234	3,073	220	92,709	8,746	668	—	34,540
1. McDonald's Corp.										
1986	333,797	193,002	128,180	1,820	—	4,654	597	—	—	5,544
1985	317,748	184,882	118,046	1,425	195	5,412	874	—	—	6,914
2. Pepsico Inc.										
1986	229,992	71,157	133,017	1,558	—	22,342	269	—	—	1,649
1985	196,439	62,997	117,735	803	—	12,707	115	35	—	2,047
3. Pillsbury Co.										
1986	196,311	70,415	105,373	905	—	18,178	132	—	—	1,308
1985	182,623	74,820	95,963	111	0.2	10,661	10	—	—	1,058
4. Wendy's International Inc.										
1986	83,701	41,668	39,190	587	—	391	560	—	—	1,305
1985	88,149	44,274	40,442	408	—	465	762	—	—	1,798
5. General Mills Inc.										
1986	40,564	27,096	9,889	81	—	3,107	57	—	—	334
1985	30,962	12,883	14,900	—	—	2,560	372	—	—	247
3. Beer										
1986	$ 873,046	$375,612	$213,750	$27,884	$18,015	$156,623	$ 36,853	$ 1,042	$ 27,614	$ 15,653
1985	764,427	340,106	174,073	26,622	11,932	148,726	36,189	884	13,227	12,668
1. Anheuser-Busch Cos.										
1986	345,415	158,344	85,934	19,326	14,576	42,256	11,763	735	6,618	5,863
1985	295,904	152,370	58,980	16,389	8,929	37,558	12,378	389	4,366	4,545
2. Philip Morris Cos.										
1986	211,677	137,896	47,889	6,050	—	—	9,705	—	6,976	3,161
1985	172,282	122,217	32,566	5,033	88	—	6,946	—	3,991	1,441
3. Coors, Adolph Co.										
1986	86,770	45,857	28,186	1,562	—	7,637	942	—	1,425	1,161
1985	69,672	18,076	34,500	1,630	—	9,537	2,309	—	2,055	1,565
4. Stroh Brewery Co.										
1986	53,910	28,920	11,608	811	1,378	5,254	4,482	47	652	758
1985	57,145	33,626	8,398	3,075	—	8,098	1,674	77	814	1,383
5. Van Munching & Co.										
1986	27,175	1,538	2,504	—	145	18,670	3,880	221	217	—
1985	56,268	6,503	9,166	—	284	31,720	7,842	378	375	—

* MMD Estimates

	Nine-media total (000)	BAR Network television (000)	BAR Spot television (000)	BAR Network cable (000)	BAR network radio (000)	RER Spot radio (000)	PIB Magazines (000)	PIB Sunday magazines (000)	MEDIA RECORDS Newspapers (000)	LNA Outdoor (000)
4. Passenger cars, domestic										
1986	$ 809,984	$380,343	$ 93,665	$11,511	$29,386	$ 18,345*	$210,523	$ 12,927	$ 49,113	$ 4,171
1985	737,942	365,555	91,208	12,085	10,156	11,270	195,707	4,334	41,299	6,328
1. General Motors Corp.										
1986	348,447	166,028	32,053	3,581	16,928	14,762	83,186	5,190	24,681	2,038
1985	282,255	147,294	36,959	2,299	5,062	1,765	66,306	2,119	17,655	2,796
2. Ford Motor Co.										
1986	293,459	135,816	40,003	4,081	12,068	927	84,171	3,792	10,992	1,609
1985	280,024	144,709	30,109	5,213	3,445	2,747	76,131	1,274	14,618	1,778
3. Chrysler Corp.										
1986	155,815	70,325	20,129	3,132	390	2,598	41,888	3,945	12,883	525
1985	157,972	66,686	22,636	4,276	1,649	5,824	45,403	942	8,801	1,755
4. American Motors Corp.										
1986	11,783	8,174	1,448	718	—	57	991	—	395	—
1985	17,590	6,866	1,498	296	—	935	7,803	—	186	6
5. Classic Motor Carriages Inc.										
1986	319	—	—	—	—	—	285	—	34	—
1985	439	—	—	—	—	—	184	—	255	—
5. Passenger cars, imported										
1986	$ 742,795	$257,010	$188,272	$10,328	$ 2,673	$ 11,848*	$204,728	$ 2,130	$ 61,598	$ 4,208
1985	586,251	210,575	125,441	8,049	4,303	4,526*	175,084	3,030	50,856	4,387
1. Volkswagenwerk AG										
1986	107,972	48,604	17,388	807	—	883	34,789	255	5,179	67
1985	84,438	34,758	13,821	628	—	46	30,744	608	3,538	295
2. Toyota Motor Corp.										
1986	94,212	20,012	51,930	1,636	—	589	16,251	157	2,341	1,296
1985	69,920	17,497	35,250	1,163	907	320	10,344	31	3,010	1,398
3. Honda Motor Co.										
1986	87,912	35,707	14,654	2,323	2,200	3,383	26,171	472	2,976	26
1985	59,977	32,697	1,546	1,767	3,154	2,659	16,903	285	941	25
4. Itoh, C. & Co.										
1986	68,275	24,632	16,898	1,035	—	771	20,810	—	4,129	—
1985	58,435	29,894	8,143	1,508	—	5	17,833	—	1,040	12
5. Nissan Motor Co.										
1986	65,074	26,707	20,678	393	—	900	12,915	33	2,644	804
1985	56,295	18,648	21,358	653	—	170	12,836	—	1,598	1,032
6. Cigarettes										
1986	$ 693,295	—	$ 866	—	—	—	$315,976	$ 62,507	$125,631	$188,315
1985	829,280	—	307	—	—	—	368,074	66,628	183,497	210,774
1. Philip Morris Cos.										
1986	272,865	—	—	—	—	—	153,998	15,837	45,120	57,910
1985	300,108	—	90	—	—	—	153,020	17,387	65,905	63,706
2. RJR Nabisco Inc.										
1986	252,198	—	—	—	—	—	95,093	34,586	44,150	78,369
1985	308,250	—	—	—	—	—	125,241	31,283	62,682	89,044
3. Loews Corp.										
1986	63,324	—	—	—	—	—	27,039	6,782	4,953	24,550
1985	88,079	—	—	—	—	—	30,970	3,864	28,278	24,967
4. B.A.T Industries PLC										
1986	46,272	—	47	—	—	—	15,943	1,636	8,516	20,130
1985	57,146	—	16	—	—	—	20,546	11,426	2,628	22,530
5. American Brands Inc.										
1986	30,583	—	—	—	—	—	20,016	3,430	21	7,116
1985	38,129	—	—	—	—	—	27,401	301	3,672	6,755
7. Telephone companies, public & private										
1986	$ 670,970	$168,215	$207,825	$ 3,680	$21,681	$ 43,515*	$ 99,285	$ 3,398	$120,855	$ 2,516
1985	698,485	143,783	195,441	3,807	19,565	39,880*	112,483	4,602	176,720	2,204
1. American Telephone & Telegraph Co.										
1986	267,028	121,830	35,656	2,843	21,664	5,480	47,562	1,804	30,099	90
1985	313,886	135,690	29,059	3,475	19,565	5,716	67,780	2,929	49,565	107
2. US Sprint Communications Co.										
1986	73,529	25,012	36,906	258	—	1,923	6,001	195	3,234	—
1985	53,940	—	51,905	—	—	—	2,014	—	—	21

	Nine-media total (000)	BAR Network television (000)	BAR Spot television (000)	BAR Network cable (000)	BAR network radio (000)	RER Spot radio (000)	PIB Magazines (000)	PIB Sunday magazines (000)	MEDIA RECORDS Newspapers (000)	LNA Outdoor (000)
3. MCI Communications Corp.										
1986	43,269	12,539	20,927	170	—	564	6,692	101	2,276	—
1985	33,584	—	30,314	—	—	97	1,685	—	1,488	—
4. NYNEX Corp.										
1986	43,743	44	18,684	89	—	1,790	3,423	966	18,614	133
1985	36,871	53	14,974	4	—	1,832	3,913	746	15,133	216
5. GTE Corp.										
1986	38,832	8,234	8,422	43	—	1,966	4,893	78	15,196	—
1985	37,677	8,041	4,074	149	—	5,681	6,152	—	13,382	198
8. Department stores										
1986	$ 586,967	$130,454	$297,367	$ 3,440	$45,339	$ 48,053	$ 53,838	$ 6,066	—	$ 2,410
1985	$ 551,072	152,054	296,961	3,906	21,135	30,705	41,407	2,676	—	2,228
1. Sears Roebuck & Co.										
1986	142,045	57,253	16,734	1,167	37,596	10,332	17,076	1,761	—	126
1985	146,784	91,280	21,411	3,026	16,700	4,322	9,898	105	—	42
2. K mart Corp.										
1986	66,770	26,333	13,584	648	6,526	2,131	16,437	1,103	—	8
1985	52,023	16,222	17,181	513	4,435	3,577	9,843	—	—	252
3. Penney, J.C. Co.										
1986	65,618	46,867	10,663	1,616	1,218	875	3,771	587	—	21
1985	63,041	44,552	14,184	358	—	61	3,712	21	—	153
4. Dayton-Hudson Corp.										
1986	31,722	—	28,023	—	—	3,496	86	—	—	117
1985	29,973	—	27,354	—	—	2,419	63	—	—	137
5. Federated Department Stores Inc.										
1986	28,782	—	22,843	—	—	2,209	2,965	369	—	396
1985	25,554	—	19,835	—	—	1,048	3,459	1,086	—	126
9. Cereals										
1986	$ 518,617	$317,311	$156,570	$18,714	$ 799	$ 1,603*	$ 21,031	$ 119	$ 2,470	—
1985	468,131	288,023	130,867	16,360	2,266	3,903*	22,228	1,219	3,241	24
1. Kellogg Co.										
1986	188,650	153,735	31,020	2,802	0.4	—	1,023	—	70	—
1985	183,786	143,267	35,695	4,190	—	458	57	—	119	—
2. General Mills Inc.										
1986	155,165	57,213	85,581	9,403	798	124	1,784	79	183	—
1985	124,810	51,958	60,446	7,873	432	176	3,412	—	489	24
3. Philip Morris Cos.										
1986	80,536	50,731	15,414	3,710	—	74	10,530	—	77	—
1985	73,712	38,494	19,066	2,297	636	—	11,130	1,054	1,035	—
4. Quaker Oats Co.										
1986	41,848	20,378	15,089	680	—	1,051	4,001	—	649	—
1985	28,925	16,547	6,650	209	—	2,167	2,722	164	466	—
5. RJR Nabisco Inc.										
1986	28,543	21,718	3,544	1,511	—	—	1,655	34	81	—
1985	19,193	14,298	1,041	1,025	1,197	—	1,610	—	22	—
10. Miscellaneous retail										
1986	$ 456,640	$ 63,942	$293,557	$ 6,674	$23,467	—*	$ 29,216	$ 2,122	—	$ 37,662
1985	436,156	87,692	262,500	5,504	20,202	—*	27,163	2,099	—	30,996
1. IC Industries Inc.										
1986	42,472	15,265	20,808	—	—	6,341	—	—	—	58
1985	46,860	17,823	19,667	—	—	9,275	—	—	—	95
2. Cotter & Co.										
1986	42,410	12,331	11,562	1,588	10,663	1,265	4,884	56	—	61
1985	45,762	14,656	13,126	1,492	9,049	1,491	5,904	—	—	44
3. Jack Eckerd Corp.										
1986	22,211	1,280	17,379	2,023	—	939	545	—	—	45
1985	16,435	1,889	13,159	1,012	—	161	206	—	—	8
4. Grand Metropolitan PLC										
1986	19,478	7,393	10,550	529	—	895	—	—	—	111
1985	18,280	9,733	7,735	—	—	785	—	—	—	27
5. Ace Hardware Corp.										
1986	15,810	13,414	1,585	573	85	148	—	—	—	5
1985	13,363	11,461	1,033	238	495	99	17	—	—	20

* MMD Estimates

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TOP 200 BRANDS

Project editors: Susan Benoit, Paula Schnorbus, Romy Schwab

1. McDONALD'S RESTAURANTS

McDonald's Corp.

	Media investments 1986	Media investments 1985
Magazines	$ 175,500	$ 353,000
Natl. Sun. mags.	—	—
Network tv	193,001,600	184,882,000
Spot tv	128,052,900	117,838,000
Network radio	—	195,000
Spot Radio	—	5,412,400
Outdoor	5,542,800	6,914,000
Network cable	1,820,200	1,425,000
Newspapers	(No data)	(No data)
Total	**$328,593,000**	**$317,019,400**

Marketing/brand management:
Sr exec vp mktg, Paul D. Schrage
Sr vp mktg, Peter A. Nelson
Vp natl mktg, David B. Green
Asst vp media, Laurie A. Grace
Asst vp mktg & media services, Emil Teri
Vp adv, Roy Bergold
Agency: Leo Burnett, Chicago
Exec vp media srvcs div, Willard Hadlock
Media dir: Sally Hunter
Exec vp, client service dir, James Shymkus
Acct dirs: Linda Wolf, Jerry Conner
Black agency: Burrell, Chicago
Vp-mgmt supr, Linda Pharr
Vp-media dir, Nick Howse
Vp-acct dir, Alan Dinwiddie
Acct supr, Renee Neely
Acct exec, Robert Jackson
Media supr, Deborah Gray
Asst acct exec, Larry Calhoun
Hispanic agency: Conill, N.Y.
Exec vp-acct [illegible], Charles F. Magee, Jr.
Media dir, Nancy Tellet
Acct suprs: Laura Vega, Juan Carlos Pagan

2. BURGER KING RESTAURANTS

Burger King Corp.

	Media investments 1986	Media investments 1985
Magazines	$ 51,300	—
Natl. Sun. mags.	—	—
Network tv	70,378,400	71,096,000
Spot tv	94,819,900	83,873,000
Network radio	—	—
Spot radio	3,421,168	2,200,020
Outdoor	1,095,000	964,000
Network cable	904,200	—
Newspapers	(No data)	(No data)
Total	**$170,669,968**	**$158,133,020**

Marketing/brand management:
Exec vp mktg, R.J. Trutz
Vp, adv & prom, Tom Kupciunas
Dirs mkt plng serv, Tom Kettinger, Melanie Wisniewski
Dir prom, Dennis Greenia
Dir adv, Chris Carroll
Dir mktg rsrch, Barry Schwartz
Mgrs adv, Christie Ferris, Barbara Lanning
Mgr prom, John Gomez, Pat Williams
Dir fld mktg, Dick Ambrose
Dir media, Denis Hitchmough
Parent: Pillsbury Co.
Agency: J. Walter Thompson, N.Y.
Sr vp-mgmt dirs: Jim Heekin (natl), Robert Norsworthy (fld)
Vp-acct dirs: Gary Steele (natl)
Vp-sr acct suprs: Anne Allen, Ann Morrow (natl)
Vp, mgmt suprs, Tom Hanson, Bob Selby, Greg Sieck (fld)
Acct reps, Laura Cheshire, Matt Heller, Ander Wensberg
Exec vp-U.S. dir media srvcs, Richard Kostyra
Sr vp-dir media plng, John Gray
Sr vp-assoc media dir (net neg), Arnold Chase
Vp-assoc media dir (plng), Al Romano
Media supr, Mark Stewart
Minority marketing agency: UniWorld Group, N.Y.
Pres-dir acct srvc, Herb Kemp
Mgmt supr, Andy Bonaparte
Acct suprs: Jim Miller, Ron Owens
Media dir, John Harris
Hispanic agency: Castor Spanish International

3. BUDWEISER BEER

Anheuser-Busch, Inc.

	Media investments 1986	Media investments 1985
Magazines	$ 2,038,400	$ 1,571,000
Natl. Sun. mags.	330,200	—
Network tv	47,994,100	40,935,000
Spot tv	27,524,500	20,010,000
Network radio	7,207,900	4,047,000
Spot radio	14,340,782	11,511,830
Outdoor	2,788,700	1,713,000
Network cable	8,261,900	7,345,000
Newspapers	5,360,064	2,836,000
Total	**$115,846,546**	**$89,968,830**

Marketing/brand management:

Exec vp mktg, Michael J. Roarty
Vp brand mgmt, Jack MacDonough
Vp corp media/sports mktg, Charles B. Fruit
Brand grp dir, Tom Sharbaugh
Sr brand mgr, Bob Gunthner
Prod mgrs: Jim Schumacker, Paul Stoddart
Agency: D'Arcy Masius Benton & Bowles, St. Louis
Sr vp-acct grp dir, Todd Abrams
Vp-mgmt supr, Jim Palumbo
Acct supr, Rich Lalley
Sr acct exec: Fred Wolter
Acct exec, Bryce McTavish
Sr vp-dir media srvcs, Jim Porcarelli
Sr vp-deputy dir media srvcs, Steve Phelps
Vp-assoc media dir, Beth Seib
Hispanic agencies: Castor Spanish International; San Jose & Associates (Midwest)

4. AT&T LONG DISTANCE LINES

[Domestic, residential]

AT&T Communications

	Media investments 1986	1985
Magazines	$ 9,612,000	$21,417,000
Natl. Sun. mags.	748,600	1,788,000
Network tv	64,032,000	79,326,000
Spot tv	7,044,900	4,979,000
Network radio	12,276,300	9,839,000
Spot radio	333,687	17,292
Outdoor	—	6,000
Network cable	694,800	1,372,000
Newspapers*	11,887,540	19,899,000
Total	**$106,629,827**	**$138,643,292**

*M&MD estimates

Marketing/brand management:
Adv dir, K. M. Armstrong
Adv mgrs: Jane Kleban, Stephen Block, Jackie Woodall, Bruce Carlson
Parent: American Telephone & Telegraph Co.
Agencies: Young & Rubicam, New York (international consumer long distance)
Sr vp-grp dir, Mort Lowenstein
Vp-mgmt supr, Barbara Jack
NW Ayer, New York (domestic consumer long distance)
Exec vp-mging dir, acct srvcs, Dom Rossi
Sr vp-mgmt supr, Anne MacDonald
Ogilvy & Mather Direct (domestic consumer long distance)
Sr vp-mging dir, Shelley Lazarus
Vp-mgmt supr, Cynthia Grant
Hispanic markets agency: Bermudez & Assoc., L.A.
Chmn-ceo, Eduardo Bermudez
Pres, James Golightly
Vp-acct mgmt, Marguerite Cueto
Mktg dir, Curt Fields
Brand mgr, Mary Miqueli

5. FORD LOCAL DEALERS

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$63,073,100	$55,760,000
Network radio	—	—
Spot radio	84,827	68,667
Outdoor	3,938,100	2,983,000
Network cable	—	—
Newspapers	28,360,194	25,644,000
Total	**$95,456,221**	**$84,455,667**

Marketing/brand management:
Ford Motor Division:
Dealer ad mgr, H.S. Wilson
Parent: Ford Motor Co. Local Dealers
Agencies: Various

6. MILLER LITE BEER

Miller Brewing Co.

	Media investments 1986	1985
Magazines	$ 1,431,100	$ 214,000
Natl. Sun. mags.	—	—
Network tv	60,714,700	56,162,000
Spot tv	10,194,700	10,716,000
Network radio	—	88,000
Spot radio	9,957,756	5,678,986
Outdoor	960,500	94,000
Network cable	3,043,500	2,282,000
Newspapers*	1,888,615	122,000
Total	**$88,190,871**	**$75,356,986**

Marketing/brand management:
Vp brand mgmt, Robert A. Toledo
Grp prod dir, Barry Barrett
Brand mgr, Noel Hankin
Asst brand mgrs: Jeff Schouten, Eric Hansen, Kevin Tripp, Rick Burton
Parent: Philip Morris Cos.
Agency: Backer & Spielvogel, N.Y.
Exec vp-coo, G. Robert Holmen
Sr vp-grp dir, Jeffrey F. Palmer
Vp-mgmt supr, Frank J. Assumma
Acct dir, Steve Smith
Acct execs: W. Crosby Renwick, Don Moriarty
Exec vp med svce, Stephen Leff
Sr vp media, Scot Butler
Media dir, Jay Schoenfeld
Vp assoc med dir, Bill McCarron
Hispanic Agency: Mendoza, Dillon & Associados, Inc. Newport Beach, CA
Vp acct svces, Eduardo Del Rivero

7. KENTUCKY FRIED CHICKEN FOOD SERVICE

KFC Corporation

	Media investments 1986	1985
Magazines	—	$ 45,000
Natl. Sun. mags.	—	—
Network tv	$ 47,904,500	44,565,000
Spot tv	31,947,100	30,702,000
Network radio	—	—
Spot radio*	2,371,576	2,229,279
Outdoor	709,700	720,000
Network cable	743,300	370,000
Newspapers	(No data)	(No data)
Total	**$83,676,176**	**$78,631,279**

*M&MD estimates

Marketing/brand management:
Exec Dir, Phillip E. Risinger
Vp mktg dir, Michael O. Willson
Mgr adv svces, Susan Yates
Parent: PepsiCo Inc.
Agency: Young & Rubicam, N.Y.
Grp dir, John Glorieux
Mgmt suprs: Chris Becker, Peter Nicholson
Acct suprs: Fred Langbecker, David Findel
Acct exec, Charles Hurdman
Asst acct exec, May Wong
Media grp dir network, Paul Isaacson
Media grp supr, Ira Tumpowsky

Hyundai Excel's introduction drove the import into the top 100 entries.

8. UNITED AIRLINES PASSENGER SERVICE

United Airlines, Inc.

	Media investments 1986	1985
Magazines	$ 6,009,600	2,309,000
Natl. Sun. mags.	169,100	—
Network tv	27,628,400	28,029,000
Spot tv	14,540,900	12,579,000
Network radio	2,175,400	1,447,000
Spot radio	11,115,389	10,583,852
Outdoor	620,300	482,000
Network cable	1,665,800	1,348,000
Newspapers	19,043,368	11,734,000
Total	**$82,968,257**	**$68,511,852**

Marketing/brand management:
Sr vp mktg, James E. Goodwin
Vp adv & prom, John Ruhaak
Dir adv, Bill Alenson
Mgrs: Bill Groundwater, Al Sortwell, Joan Straub
Parent: Allegis Corp.
Agency: Leo Burnett, Chicago
Sr vp-acct dir, Jim Thompson
Vp-acct supr, John Goad
Acct supr, Mike Arnold
Sr vp mgr media dept, Willard Hadlock
Vp media dir, Sally Hunter

9. WENDY'S RESTAURANTS

Wendy's International Inc.

	Media investments 1986	1985
Magazines	$ 554,300	$ 762,000
Natl. Sun. mags.	—	—
Network tv	41,667,600	44,274,000
Spot tv	37,912,700	39,323,000
Network radio	—	—
Spot radio	391,186	464,829
Outdoor	1,293,800	1,797,000
Network cable	586,800	408,000
Newspapers	(No data)	(No data)
Total	**$82,406,386**	**$87,028,829**

Marketing/brand management:
Exec vp mktg, Charles Rath
Vp corp mktg, Bruce Ley
Vp fld mktg, Don Calhoon
Vp corp comm, Denny Lynch
Vp mktg analysis/new prod, Michael Sapienza
Agency: Backer & Spielvogel
Chair & ceo, Carl Spielvogel
Pres, William M. Backer
Exec vp-dir media svcs, Stephen M. Leff
Grp mgmt rep, Randolph C. Lindel
Media dir, Jay Schoenfeld
Black markets agency: Lockhart & Pettus, N.Y.
Sr vp-dir client srvcs, Ronn Harris
Hispanic agency: Mendoza, Dillon, & Associados, Inc. Newport Beach, Calif.
Vp acct svces, Eduardo del Rivero

Wrigley's has three gums among the Top 200 advertisers: Doublemint, Spearmint and Extra Sugar Free.

10. AMERICAN AIRLINES PASSENGER SERVICE

American Airlines, Inc.

	Media investments 1986	1985
Magazines	$ 4,010,100	$ 2,401,000
Natl. Sun. mags.	—	—
Network tv	18,276,900	23,008,000
Spot tv	18,020,100	16,281,000
Network radio	433,200	461,000
Spot radio	14,111,408	14,217,018
Outdoor	162,100	80,000
Network cable	486,200	190,000
Newspapers	24,648,934	19,293,000
Total	**$80,148,942**	**$75,931,018**

Marketing/brand management:
Sr vp mktg, Michael W. Gunn
Vp-adv & mktg, R.A. McKinnon
Asst vp adv, Adrianna W. Smits
Vp corp comm, Lowell C. Duncan
Mgrs adv: William E. Quackenbush, Bruce Goodyear, Andrea Spica, Ann White
Asst vp sls prom, Frank J. DiNuzzo
Mgr adv admin, Gregg Mavico
Parent: AMR Corp.
Agency: Bozell Jacobs Kenyon & Eckhardt, Dallas
Exec vp-acct dir, Paul Gold
Sr vp-grp dirs, Tom Hooke, Philip Brushaber, Mary Bresnahan
Sr vp-research dir, Janice Urbanic

11. CHEVROLET LOCAL DEALERS

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$40,845,200	$46,566,000
Network radio	—	—
Spot radio	7,167	95,275
Outdoor	4,772,400	4,245,000
Network cable	—	—
Newspapers	34,462,220	34,195,000
Total	**$80,086,987**	**$85,101,275**

Marketing/brand management:
Chevrolet Div., General Motors:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Asst gen sls mgr, M. H. Erdman
Mktg mgrs: Ed K. Roggenkamp III (fld), Thomas R. Mason (passenger cars), John M. Kelley (trucks)
Mgrs adv: Danielle K. Colliver (passenger cars), Thomas P. Cutler (trucks)
Asst mgr fld mktg, J. D. Tidwell, Jr.
Parent: General Motors Corp. Local Dealers
Agencies: Various

12. PIZZA HUT RESTAURANTS

Pizza Hut, Inc.

	Media investments 1986	1985
Magazines	$ 98,700	—
Natl. Sun. mags.	—	—
Network tv	$21,281,900	18,433,000
Spot tv	49,983,400	44,889,000
Network radio	—	—
Spot radio	601,986	674,551
Outdoor	636,300	739,000
Network cable	814,900	397,000
Newspapers	(No data)	(No data)
Total	**$73,417,186**	**$65,132,551**

Marketing/brand management:
Sr vp mktg, David Novak
Vp adv, David Ropes
Agency: Chiat/Day, Los Angeles
Exec vp mgmt, Greg Helm
Mgmt supr, Tom Carroll
Acct suprs: Mark Billfield, Scott Flood
Vp media dir, Hank Antosz
Vp assoc med dir, Richard Wittstadt

13. AMERICAN EXPRESS CREDIT CARD SERVICES

American Express Co.

	Media investments	
	1986	1985
Magazines	$13,250,100	$15,239,000
Natl. Sun. mags.	544,000	594,000
Network tv	39,673,400	27,994,000
Spot tv	14,569,600	12,574,000
Network radio	—	—
Spot radio	2,619,670	5,278,646
Outdoor	14,700	13,000
Network cable	497,300	334,000
Newspapers*	388,494	—
Total	$71,557,264	$62,026,646

*M&MD estimates

Marketing/brand management:
Sr vp mktg, Morris Perlis
Vp adv, Joan Bonnetti
Agencies: Ogilvy & Mather, N.Y.
Sr vp-grp dir, Tim Elliott
Vp-mgmt supr, Scott Marshall
Sr vp-assoc media dir, Wilma Epstein
Vp-asst media dir, Linda Fidelman
Vp-acct supr, Rebecca Saeger
McCann-Erickson, N.Y.
(Gold Card)
Sr vp-mgmt rep, Ian Hooper
Vp-acct dir, Tom Beach
Exec vp-media dir, Ira Carlin
Vp-plng mgr, Vince Tortorelli

14. MILLER HIGH LIFE BEER

Miller Brewing Co.

	Media investments	
	1986	1985
Magazines	$ 3,270,500	$ 4,080,000
Natl. Sun. mags.	—	—
Network tv	38,803,500	47,429,000
Spot tv	9,598,100	7,046,000
Network radio	—	—
Spot radio*	12,272,488	9,614,182
Outdoor	1,625,700	802,000
Network cable	2,082,500	1,910,000
Newspapers*	1,888,615	1,913,000
Total	$69,541,403	$72,794,182

*M&MD estimates

Marketing/brand management:
Vp brand mgmt, Robert Toledo
Brand mgr, Robert Tyley
Grp prod dir, Jerry Schmutte
Asst brand mgr, Greg Plowe
Media dir, Robert Ward
Parent: Philip Morris Cos.
Agency: JWT, New York
Sr vp-grp dir, Tim Arnold
Vp-sr acct supr, Martin Susz
Acct exec, Susan Sheldon
Exec vp-U.S. dir media srvcs, Richard Kostyra
Sr vp-dir media plng, John Gray
Vp-assoc media dir, Michael Gross
Media supr, Eric Snyder
Media plnr, Julia Harquail
Asst media plnr, Anne Gurin
Hispanic Agency: Mendoza, Dillon & Associados, Inc.
Newport Beach, Calif.
Vp acct svces, Eduardo Del Rivero

15. BUD LIGHT BEER

Anheuser-Busch, Inc.

	Media investments	
	1986	1985
Magazines	$ 666,600	$ 169,000
Natl. Sun. mags.	—	—
Network tv	34,332,300	30,082,000
Spot tv	16,159,400	11,844,000
Network radio	807,900	826,000
Spot radio	5,743,854	5,381,848
Outdoor	831,500	536,000
Network cable	4,130,600	3,949,000
Newspapers	206,213	270,000
Total	$62,878,367	$53,057,848

Marketing/brand management:
Exec vp mktg, Michael J. Roarty
Vp brand mgmt, Jack MacDonough
Vp corp media/sports mktg, Charles B. Fruit
Grp brand dir, Tom Sharbaugh
Sr prod mgr, Joe Corcoran
Prod mgr, Mark Schupp
Agency: DDB/Needham Worldwide, Chicago
Vp-acct supr, Mike Kearns
Sr vp-mgmt rep, Don Richards
Acct exec, David Kirk
Asst acct exec, Lisa Henson
Sr vp-grp acct dir, Ron Bess
Vp-assoc media dir, Gary Mueller
Media supr, Scott Morehead
Media plnr, Greg Field
Hispanic agency: Castor Spanish International

16. DELTA AIRLINES PASSENGER SERVICE

Delta Air Lines, Inc.

	Media investments	
	1986	1985
Magazines	$ 413,600	$ 426,000
Natl. Sun. mags.	—	—
Network tv	2,131,600	6,142,000
Spot tv	13,246,900	13,356,000
Network radio	—	—
Spot radio	21,707,648	19,902,845
Outdoor	1,759,400	1,844,000
Network cable	4,447,900	4,715,000
Newspapers	19,051,639	16,993,000
Total	$62,758,887	$63,378,845

Marketing/brand management:
Sr vp mktg, W. W. Hawkins
System mgr, adv & sales prom, Judy Jordan
Mgrs adv: Wayne Soph, Sandy Rowan
Agency: BDA/BBDO, Atlanta
Pres-mgmt supr, Glenn Verrill
Exec vp-acct supr, Jack Walz
Exec vp-creative dir, Gregg Dearth
Sr vp-media dir, Martin Hollinger

17. EASTERN AIRLINES PASSENGER SERVICE

Eastern Air Lines Inc.

	Media investments	
	1986	1985
Magazines	$ 2,010,800	$ 4,397,000
Natl. Sun. mags.	67,000	31,000
Network tv	434,700	350,000
Spot tv	14,579,300	15,326,000
Network radio	—	—
Spot radio	12,828,285	14,943,609
Outdoor	767,600	1,325,000
Network cable	185,400	138,000
Newspapers	28,970,588	20,710,000
Total	$59,843,673	$57,220,609

Marketing/brand management:
Vp mktg, John W. Nelson
Staff vp adv, William H. Dowse
Mgrs: Robert A. Wolf (vacation adv), Jennifer Montague (bus adv), Robert de Cespedes (intl), Robert J. Bauer (sls prom)
Agency: Campbell-Ewald, Detroit
Sr vp-assoc mgmt supr, R. F. Henry
Vp-acct suprs: T. Steele, M. Solomon, D. McAfee
Acct supr, Jamie Hoit

(continued)

Sr vp-assoc media dir, Robert Gervason
Sr vp-media mgr, Howard Zoss
Grp sr vp, Joseph Karle
Sr vp-assoc mgmt suprs: Warren Ruden, Michael Rogers, Gunther Saupe
Exec vp-dir media srvcs, Louis M. Schultz

18. IBM PERSONAL COMPUTER SYSTEMS

IBM Information Systems Group

	Media investments 1986	Media investments 1985
Magazines	$11,686,000	$ 9,611,000
Natl. Sun. mags.	—	92,000
Network tv	33,704,100	22,376,000
Spot tv	13,400	865,000
Network radio	958,500	1,070,000
Spot Radio	248,568	3,549,321
Outdoor	—	—
Network cable	605,500	655,000
Newspapers*	8,630,500	16,670,000
Total	**$55,846,568**	**$55,888,321**

*M&MD estimates

Marketing/brand management:
Dir adv, D. T. Coker
Systems/sector adv mgr, T.D. McGovern
Workstations/administrative products adv mgr, R. J. O'Leary
Parent: International Business Machines Corp.
Agency: Lord, Geller, Federico, Einstein, N.Y.
Sr vp, Ray Freeman

19. TACO BELL RESTAURANTS

Taco Bell

	Media investments 1986	Media investments 1985
Magazines	—	$ 56,000
Natl. Sun. mags.	—	—
Network tv	1,970,100	—
Spot tv	48,267,300	$38,655,000
Network radio	—	—
Spot radio	5,208,258	11,337,885
Outdoor	302,500	589,000
Network cable	—	37,000
Newspapers	(No data)	(No data)
Total	**$55,748,158**	**$50,674,885**

Marketing/brand management:
Vp mktg, James P. Loser
Vp fld mktg, Steve Carley
Dirs fld mktg: Craig Held, Bruce Galler
Vp adv, George Reynolds
Dir media svces, Keith Landau
Mgr media srvcs, Diane Nivison
Parent: PepsiCo Inc.
Agency: Tracy-Locke, Dallas
Exec vp-mgmt rep, Tom Morris
Vp-acct suprs: Neil Naroff, Ken Gal
Vp media dir, Sandra McQuality

20. U.S. ARMY RECRUITING

U.S. Army Recruiting

	Media investments 1986	Media investments 1985
Magazines	$ 8,713,800	$ 7,818,000
Natl. Sun. mags.	790,500	355,000
Network tv	29,836,100	20,426,000
Spot tv	1,900	4,000
Network radio	8,147,000	4,543,000
Spot radio*	4,177,613	5,734,455
Outdoor	53,300	73,000
Network cable	1,698,600	1,067,000
Newspapers	1,269,053	1,929,000
Total	**$54,687,866**	**$41,949,455**

*M&MD estimates

Marketing/brand management:
Adv & sls prom dir, Col. David Fabian
Deputy dir opers, adv & sls prom, Lt Col Ronald L. Morsch
Chief, media & dist. Maj Robert E. Gaylord
Agency: Young & Rubicam, N.Y.
Exec vp grp dir, John Glorieux
Sr vp mgmt supr, Bill Green
Acct suprs: Jim Siegel, Anne Sullivan
Sr vp grp media supr, Nancy Smith
Media planning suprs: Martha Spratley, Nancy Frey

There are 14 fast-food chains in this year's ranking. Last year there were 12.

21. FORD DEALERS ASSOCIATION FRANCHISE

	Media investments 1986	Media investments 1985
Magazines	—	$ 2,000
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$37,754,200	25,062,000
Network radio	—	—
Spot radio	$4,985,119	3,942,436
Outdoor	1,463,200	1,339,000
Network cable	—	—
Newspapers	8,853,850	8,611,000
Total	**$53,056,369**	**$38,956,436**

Marketing/brand management:
Ford Motor Division:
Dealer ad mgr, H.S. Wilson
Parent: Ford Auto Dealers Association
Agencies include J. Walter Thompson, Detroit
Exec vp-gm, Peter Schweitzer
Sr vp-acct dir, Hugh Trenkamp
Sr vp-media dir, Tom Healey
Vp-grp media dir (cars & trucks), Paul Hunt
Vp-media dir (cars), Howard Spokes
Sr vp-bdcst supr, Ron Fredrick
Note: JWT is involved with the advertising of about half of Ford's dealer associations.

22. LEE ARTIFICIAL NAILS

Lee Pharmaceuticals

	Media investments 1986	Media investments 1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 42,342,400	$ 8,968,800
Spot tv	3,774,100	2,344,500
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	5,651,800	1,372,900
Newspapers	—	—
Total	**$51,768,300**	**$12,686,200**

Marketing/brand management:
Exec vp, treasurer, Ronald G. Lee
Agencies: Lee & Lee Advertising (in-house)
Pres, Ronald G. Lee
Western Media, Los Angeles
Sr vp dir ntwk prgm, Chuck Bachrach *(continued)*

Vp asst dir ntwk byng, Kathy McGrath
Asst buyer, Betsy Lebow

23. PEPSI-COLA

PepsiCo Inc.

(Not including Pepsi Free, Pepsi Light, Diet Pepsi, etc.)

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 4,139,800	$ 9,819,000
Spot tv	37,881,600	28,000,000
Network radio	14,000	216,000
Spot radio	5,344,128	5,958,318
Outdoor	1,221,700	1,538,000
Network cable	1,094,800	1,534,000
Newspapers	1,954,582	2,200,000
Total	**$51,650,610**	**$49,265,318**

Marketing/brand management:
Pres, Roger Enrico
Exec sr vp crtv srvcs, Allan Pottasch
Vp mktg, Mike Lorelli
Adv mgr, Jeff Myers
Media dir, Rick Rock
Assoc media dir, Mary Ann Power
Agency: BBDO, New York
Exec vp-sr mgmt rep, Gary DePaolo
Sr vp-mgmt supr, Bill Katz
Exec vp-dir media srvcs, Arnie Semsky
Sr vp-dir media plng srvcs, Mike Drake
Sr vp-dir net tv & prog, Steve Grubbs
Sr vp-assoc media dir, Ivan Becker
Vp assoc ntwk dir, Stu Shlossman
Media suprs: Rene Goldmuntz, Mary Ann Cunningham
Media plnr, Mike Giarraputo

24. MICHELOB BEER

Anheuser-Busch, Inc.

	Media investments 1986	1985
Magazines	$ 1,772,800	$ 1,976,000
Natl. Sun. mags.	—	31,000
Network tv	30,328,900	22,887,000
Spot tv	7,913,900	6,377,000
Network radio	5,204,900	3,855,000
Spot radio	2,655,996	3,676,956
Outdoor	323,700	289,000
Network cable	2,493,700	1,676,000
Newspapers	518,179	335,000
Total	**$51,212,075**	**$41,102,956**

Marketing/brand management:
Exec vp dir mktg, Michael J. Roarty
Vp brand mgmt, Jack MacDonough
Vp corp media/sports mktg, Charles B. Fruit
Grp mktg mgr, Robert Goughenour
Sr prod mgr, Pete Russell
Agency: DDB/Needham Chicago
Acct supr, Peter Kuntz
Acct exec, David Kuelper
Sr vp-mgmt rep, Don Richards
Dir acct mngt, Gene Yovatich
Vp-assoc media dir, Geoffrey McClelland
Media supr, Michael Murphy
Media planners: Kristine King, Mark Sneider
Hispanic Agency: Castor Spanish International

25. HASBRO TOYS

Hasbro, Inc.

(Not including Playskool and Milton Bradley)

	Media investments 1986	1985
Magazines	$ 70,500	$ 2,023,000
Natl. Sun. mags.	—	—
Network tv	5,845,400	17,582,000
Spot tv	42,410,800	41,259,000
Network radio	—	—
Spot radio	29,406	2,975,595
Outdoor	—	—
Network cable	2,096,400	568,000
Newspapers	—	284,000
Total	**$50,452,506**	**$64,691,595**

Marketing/brand management:
Sr vp mktg, Steve Schwartz
Corp vp mktg srvcs, Alfred C. Carosi Jr.
Dir media srvcs, Debbie Boyd
Vp boys' toys, Bob Prupis
Vp girls' toys, Maurene Souza
Agency: Griffin Bacal, New York
Pres, Tom Griffin
Exec vp client srvcs, Paul Kurnit
Exec vp-dir crtv srvcs, Joe Bacal
Exec vp-dir media srvcs, Arthur Heller
Sr vp-crtv dir, Leonard Leokum
Vp-mgmt suprs: Bob Horne (boys'), Mary Sue Robinson (girls' and softies)

26. NISSAN COMPACT TRUCKS

Nissan Motor Co. Ltd.

	Media investments 1986	1985
Magazines	$ 4,977,400	$ 3,163,000
Natl. Sun. mags.	—	—
Network tv	15,037,100	13,739,000
Spot tv	20,462,400	20,448,000
Network radio	—	—
Spot radio*	5,618,044	10,047,388
Outdoor	160,600	353,000
Network cable	158,700	310,000
Newspapers	3,360,677	3,326,000
Total	**$49,774,921**	**$51,386,388**

*M&MD estimates

Marketing/brand management:
Dir gen mgr adv & sls prom, Joe Opre
Natl truck adv mgr, Dave Hubbard
Media plng mgr, Susan Furedi
Agency: William Esty, NY
Sr vp-acct dir, Dick Macedo (L.A.)
Sr vp-acct svces, Don Trepte (L.A.)
Sr vp media dir, Stacey Lippman
Sr vp-grp media dir, Lucielle Gionet
Assoc media dirs: Doug Powers (N.Y.), Jolene Fedrick (L.A.)

27. NISSAN DEALERS ASSOCIATION FRANCHISE

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$47,871,400	$46,818,000
Network radio	—	—
Spot radio	186,628	428,143
Outdoor	14,000	—
Network cable	—	(No data)
Newspapers	886,040	1,662,000
Total	**$48,958,068**	**$48,908,143**

Marketing/brand management:
Nissan Auto Dealers Assoc.:
Dir gen mgr adv & sls prom, Joe Opre
Natl dealer adv mgr, Byrne Owens
Dealer adv suppt mgr, Dale Finley
Media plng mgr, Susan Furedi
Parent: Nissan Auto Dealers Association
Agencies: Various

28. ADVIL PAIN RELIEVER

Whitehall Laboratories

	Media investments 1986	1985
Magazines	$ 4,533,800	$ 3,047,000
Natl. Sun. mags.	33,500	—
Network tv	40,032,600	29,556,000
Spot tv	818,300	1,801,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	637,000	640,000
Newspapers	31,815	—
Total	**$46,087,015**	**$35,044,000**

Marketing/brand management:
Vp mktg, Andrew C. Davis
Grp prod mgr, Holly Crosbie-Foote
Sr prod mgr: Don Raskin
Prod mgrs: Brian Pazaras, Mike Gemma
Adv dir, Steven Palmisano
Asst prod mgr, Susan Sprung
Prod mgr-pub rel, Dorothy Wetzel
Parent: American Home Products Corp.
Agency: Young & Rubicam, N.Y.
Sr vp-grp dir, Art Klein
Sr vp-mgmt supr, Tim Fitzgerald
Acct supr, Fred Langbecker
Acct exec, Patricia Willis, Paul Gundlach
Sr vp media, Joseph Mannix
Media supr, Jean Mason

29. MIDAS MUFFLER & BRAKE SHOPS

Midas International Corp.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$15,265,400	$17,823,000
Spot tv	20,808,400	19,667,000
Network radio	—	—
Spot radio*	6,341,281	9,275,464
Outdoor	58,400	95,000
Network cable	—	—
Newspapers	(No data)	(No data)
Total	**$42,473,481**	**$46,860,464**

*M&MD estimates

Marketing/brand management:
Vp franchise oper & mktg, Russ Richards
Vp adv & pub rels, Ralph Linder
Adv mgr, Karen Greco
Parent: IC Industries Inc.
Agency: Wells, Rich, Greene, Chicago
Pres-acct grp dir, Larry Singer
Vp natl acct supr, Robert DiFranco
Sr vp-dir fld srvc, Stan Flaum
Sr vp-media dir, Jill Cassorla
Assoc media dir, Constance MacTaggart

30. TRUE VALUE STORES

Cotter & Co.

	Media investments 1986	1985
Magazines	$ 4,693,100	$ 5,436,000
Natl. Sun. mags.	56,300	—
Network tv	12,331,100	14,656,000
Spot tv	11,562,300	13,126,000
Network radio	10,663,100	9,049,000
Spot radio	1,264,655	1,490,823
Outdoor	60,800	44,000
Network cable	1,588,200	1,492,000
Newspapers	—	—
Total	**$42,219,555**	**$45,293,823**

Marketing/brand management:
Sec/treas-merch mgr, Ed Lanctot
Agency: Home Products Marketing, Chicago (in-house)
Sls prom mgr, Harry Adams
Adv mgr (regional), Gary Coppinger

31. FORD TAURUS

Ford Motor Co.

	Media investments 1986	1985
Magazines	$14,310,100	$ 4,190,100
Natl. Sun. mags.	—	—
Network tv	22,528,100	3,679,700
Spot tv	2,574,800	273,800
Network radio	1,311,400	1,554,800
Spot radio	171,265	80,529
Outdoor	301,900	—
Network cable	594,500	58,700
Newspapers	105,564	85,682
Total	**$41,897,629**	**$9,923,311**

Marketing/brand management:
Ford Division:
Vp-gm, R.L. Rewey *(continued)*

AKRON BAG LADIES

They're everywhere. Toting bags. Pushing shopping carts filled to the brim...with groceries.

In the four-county area surrounding Akron, shoppers spent nearly $1.4 billion on food purchases. That's no small potatoes. The problem is these shoppers may not be buying your brand if you're not advertising in their brand of newspaper—The Beacon Journal.

Considering 30% of the Cleveland ADI is in the Akron Newspaper Designated Market, you may be missing a lot of coupon clippers who shop at the large regional chains as well as locally owned and operated supermarkets. With daily readership totalling 312,000, The Beacon Journal provides a large audience hungry for your products.

Put Akron on your media shopping list. Advertise in the city's appetizing newspaper.

The Beacon Journal

44 East Exchange Street Akron, Ohio 44328 216/375-8261 A Knight-Ridder Newspaper

Circulation Figures/1986 ABC Reports
Population & Household Figures/© 1987 S&MM Survey of Buying Power Data Service

Gen mktg mgr, Ross Roberts
Adv mgr, John Vanderzee
Car ad mgr, R. J. Gillooly (cars)
Dealer ad mgr, H.S. Wilson
Agency: J. Walter Thompson, Detroit
Exec vp-gm, Peter Schweitzer
Sr vp-acct dir, Chuck Balestrino
Sr vp-media dir, Tom Healey
Vp-grp media dir (cars & trucks), Paul Hunt
Vp-media dir (cars), Howard Spokes
Sr vp-bdcst supr, Ron Fredrick
Hispanic markets agency: Hispania/JWT, N.Y.
Sr vp-gm, Alfredo Jarrin
Acct supr, Andrea Doren
Media dir, Carlos Cintron
Acct exec, Ivan Pichardo
Black agency: Burrell Advertising
Vp-mgmt supr, Don Coleman
Acct exec, Esther Terrell
Vp-media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

32. COORS BEER

Adolph Coors Co.

	Media investments 1986	1985
Magazines	$ 182,800	2,039,000
Natl. Sun. mags.	—	—
Network tv	20,471,900	$11,408,000
Spot tv	13,997,900	17,882,000
Network radio	—	—
Spot radio	4,528,324	6,143,698
Outdoor	510,500	1,020,000
Network cable	832,100	885,000
Newspapers	1,231,931	1,465,000
Total	**$41,755,455**	**$40,842,698**

Marketing/brand management:
Exec vp sls & mktg, Robert A. Recholtz
Vp mktg, Rob Klugman
Brand dir, Gary Naifeh
Brand mgr, Bob McBride
Vp mktg devel, Gary Truitt
Agency: Foote, Cone & Belding, Chicago
Sr vp-grp acct dir, Bill Melzer
Vp-acct dirs: Dale Smith, Jim Gregga, Tim Prosch, Randy Windschitl
Acct dir, David Sollitt
Acct exec, Pam Crowson-Brash
Sr vp media, Fred Wray
Vp-grp media dir, Kent Vlautin
Media suprs: Bill Blaha, Mary Salmich, Steve Vye, Doug Powell, Lynne Muth
Black agency: UniWorld, N.Y.
Chmn-ceo, Byron Lewis
Pres-dir acct srvcs, Herb Kemp
Acct supr, Fred Jackson
Grp media dir, John Harris
Vp-assoc crtv dir, Valerie Graves
Hispanic markets agency: GSD&M, Austin, TX
Chmn, Steve Gurasich
Sr vp, Chuck Grady
Dir Hispanic srvcs, Raoul Rodriguez
Corp & pub affrs dir, Hank Olguin
Vp-assoc media dir, Tina Williamson

33. AT&T BUSINESS LONG DISTANCE

AT&T Communications

	Media investments 1986	1985
Magazines	$7,685,100	$ 10,726,000
Natl. Sun. mags.	33,500	—
Network tv	18,527,000	29,417,000
Spot tv	7,754,900	5,752,000
Network radio	1,926,300	372,000
Spot Radio	—	—
Outdoor	—	—
Network cable	928,700	1,178,000
Newspapers*	4,639,400	4,232,000
Total	**$41,494,900**	**$51,677,000**

*M&MD estimates

Marketing/brand management:
Adv dir, C.L. Mitchell Jr.
Div mgrs: P.C. Shyposh, W.J. Higgins
Parent: American Telephone & Telegraph Co.
Agency: McCann-Erickson, N.Y. (domestic business long distance)
Sr vp-grp mgmt dir, H. O'Brien
Sr vp-mgmt rep, T. Driscoll
Young & Rubicam, New York
(International business long distance)
Sr vp-grp dir, M. Lowenstein
Sr vp-mgmt supr, M. Linder

The U.S. Mint made the list, thanks to the Statue of Liberty coins.

34. AT&T INTERNATIONAL LONG DISTANCE SERVICE

AT&T Communications

	Media investments 1986	1985
Magazines	$15,176,400	$9,482,000
Natl. Sun. mags.	824,400	257,000
Network tv	2,090,200	—
Spot tv	17,140,300	14,794,000
Network radio	623,600	—
Spot radio	—	—
Outdoor	—	—
Network cable	879,900	444,000
Newspapers*	4,349,100	4,326,000
Total	**$41,083,900**	**$29,303,000**

*M&MD estimates

Marketing/brand management:
Adv dir, K. M. Armstrong
District mgrs: J. Kleban, S. Block, J. Woodall
Parent: American Telephone & Telegraph Co.
Agency: Young & Rubicam, N.Y.
Sr vp-grp dir, M. Lowenstein
Vp-mgmt supr, Barbara Jack
Hispanic agency: Bermudez Associates
Sr acct exec, Ava Overstreet

35. KROGER FOOD STORES

The Kroger Co.

	Media investments 1986	1985
Magazines	$ 763,800	$ 56,000
Natl. Sun. mags.	—	—
Network tv	1,846,100	9,000
Spot tv	35,614,100	24,352,000
Network radio	—	—
Spot radio	—	—
Outdoor	2,296,600	533,000
Network cable	295,100	—
Newspapers	(No data)	(No data)
Total	**$40,815,700**	**$24,950,000**

Marketing/brand management:
Vp adv, Dick Owens
Adv mgr (Kroger food stores), Greg Klausing
Adv mgr (corp hdqtrs), Rich McGraw
Agency: Campbell-Mithun, Chicago
Exec vp, gen admin mgr, Marvin Goldsmith
Vp mngt supr, Jon Wylie
Vp mngt supr, John Kroening

36. MILK INDUSTRY PROMOTION

American Dairy Association

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$28,689,200	$ 23,329,000
Spot tv	8,013,800	13,122,000
Network radio	—	—
Spot radio	3,213,210	3,269,160
Outdoor	41,100	26,000
Network cable	242,500	—
Newspapers*	194,467	73,000
Total	**$40,394,277**	**$39,819,160**

*M&MD estimates

Marketing/brand management:
Sr vp mktg, adv & mktg srvcs, United Dairy Industry Association, and pres, American Dairy Association, Joseph B. Kelsch
Vp-mktg plng, Stephen A. Dohrmann
Vp-mktg srvcs, Grover B. Simpson
Dir adv srvcs, Donna A. Arcus
Mktg mgr-manufactured prods, Amy Truitt
Parent: United Dairy Industry Association
Agency: DMB&B, Chicago
Sr vp-mgmt supr, Ben Bishop
Vp-acct grp suprs: Bob Meuser, Dave Urbaniak, Mike Leonhart
Acct suprs: Brad English, Andrea Dichter
Sr vp-dir media srvcs, Joe Zeller
Vp-assoc media dir, Willard Hemsworth

37. TOYOTA DEALERS ASSOCIATION FRANCHISE

Toyota Motor Corp.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$36,530,500	7,853,900
Network radio	—	—
Spot radio	2,646,506	2,446,560
Outdoor	5,800	3,000
Network cable	—	—
Newspapers	883,791	429,475
Total	**$40,066,597**	**$10,732,935**

Marketing/brand management:
Corp mktg mgr, George Borst
Adv str & media mgr, Jan Olson
Brand mgrs: Kevin Flynn, Dave Danzer (cars), Don Cecconi (trucks)
Agency: DFS Dorland/S. Calif. (Torrance)
Exec vp, Bob Coumier

38. OLDSMOBILE DEALERS ASSOCIATIONS

	Media investments 1986	1985
Magazines	—	$ 24,000
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$36,532,100	33,621,000
Network radio	—	—
Spot radio	201,209	211,168
Outdoor	—	130,000
Network cable	—	—
Newspapers	4,296,696	3,669,000
Total	**$40,030,005**	**$37,655,168**

Marketing/brand management:
Oldsmobile Div., General Motors:
Gm, W. W. Lane
Gen sls mgr, D. E. Lahti
Exec asst gen sls mgr-mktg, W.E. Christell
Dir mktg, R. B. Jarboe
Adv mgr, R. J. Billings
Asst adv mgr, D. A. Shankwiler
Parent: General Motors Corp.
Agencies: Various
Some 130 dealer associations nationwide are represented by about 80 agencies.

39. YVES SAINT LAURENT RITZ 100's, REGULAR & MENTHOL FILTER CIGARETTES

R.J. Reynolds Tobacco Co.

	Media investments 1986	1985
Magazines	$ 9,802,500	$ 1,568,800
Natl. Sun. mags.	9,492,400	337,700
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	9,318,000	678,000
Network cable	—	—
Newspapers	11,364,216	1,415,461
Total	**$39,977,116**	**$3,999,961**

Marketing/brand management:
Vp mktg, J. T. Winebrenner
Mktg dir, R. M. Sanders
Brand mgr, R. Tompson
Dir media Dan Pearson
Grp mgr media admin, R. E. Neal
Parent: RJR Nabisco
Agency: FCB/Leber Katz Partners, N.Y.
Exec vp grp mgmt dir, Robert Hirsch
Acct dir, Rosemary O'Leary
Acct exec, Kim Glatt

40. MILLER HIGH LIFE GENUINE DRAFT BEER

Miller Brewing Company

	Media investments 1986	1985
Magazines	$1,456,000	—
Natl. Sun. mags.	—	—
Network tv	$29,873,200	—
Spot tv	5,953,300	—
Network radio	—	—
Spot radio	$269,248	—
Outdoor	1,000	—
Network cable	369,700	—
Newspapers	1,885,120	—
Total	**$39,807,568**	—

Marketing/brand management:
Vp brand mgmt, Robert Toledo
Grp prod dir, Jerry Schmutte
Asst brand mgr, Greg Plowe
Media dir, Robert Ward
Parent: Philip Morris Cos.
Agency: Backer & Spielvogel N.Y.
Sr vp grp dir, Dean Scaros
Vp acct supr, Mike Russell
Acct supr, Andrew Rider
Acct execs: Ken Wright, J.B. Raftus
Sr vp media, Scot Butler
Media Dir, Jay Schoenfeld
Exec vp media svces, Steve Leff
Vp assoc media dir, John Gates
Media supr, Dave Kupiec

Lee Nails' use of discounted tv time led to its debut at no. 22.

41. RED LOBSTER RESTAURANTS

Red Lobster Inns of America

	Media investments	
	1986	1985
Magazines	—	$ 372,000
Natl. Sun. mags.	—	—
Network tv	$ 27,096,400	12,883,000
Spot tv	9,386,300	14,832,000
Network radio	—	—
Spot radio	1,226,789	1,025,056
Outdoor	268,100	200,000
Network cable	80,800	—
Newspapers	(No data)	(No data)
Total	**$38,058,389**	**$29,312,056**

Marketing/brand management:
Vp dir adv & prom, Charles Tate
Natl media mgr, Leslie Fontenot
Fld adv & prom supr, Cynthia Pappas
Parent: General Mills, Inc.
Agency: Grey Advertising, Inc. N.Y.
Exec vp, Stew Hegleman
Sr vp, Warren Fischer

42. ABC TV NETWORK

Capital Cities/ABC, Inc.

	Media investments	
	1986	1985
Magazines	$24,134,700	$28,740,000
Natl. Sun. mags.	494,000	407,000
Network tv	—	—
Spot tv	4,300	11,000
Network radio	255,900	33,000
Spot radio	7,588,367	3,066,423
Outdoor	10,400	21,000
Network cable	605,300	620,000
Newspapers*	4,933,012	10,359,000
Total	**$38,025,979**	**$43,257,423**

*MM&D estimates

Marketing/brand management:
Vp affiliate mktg srvcs, Pete Barrett (N.Y.)
Vp mktg, Candace Farrell (L.A.)
Dir adv, Joe Green (L.A.)
Vp, creative adv, Mark Zakarin (L.A.)
Agencies: Bozell, Jacobs, Kenyon & Eckhardt, New York
(News)
Vp-mgmt supr, Les Koll
Vp,-acct supr, John Garment
Sr vp-media dir, Joel Kushins
Vp-assoc media dir, Andrea Weinreb
Lois Pitts Gershon Pon/GGK, NY
(Sports)
Dir-acct srvcs, John Tracosas
Acct supr, Dwight Davis
Acct exec, Andry Brief
Media plnr, Len Chaim
Media supr, Tony O'Haire
Grey, New York
(Entertainment programing)
Exec vp-dir media & prog, Alec Gerster
Exec vp, Donald Foley

Four domestic airlines, with a total of $285.7 million in spending, made the top 25.

43. SEARS MISCELLANEOUS BRANDS

Sears Roebuck & Co.

	Media investments	
	1986	1985
Magazines	$ 934,500	$ 1,959,000
Natl. Sun. mags.	179,100	105,000
Network tv	18,356,600	28,263,000
Spot tv	8,389,900	9,759,000
Network radio	9,711,000	4,332,000
Spot radio	—	—
Outdoor	120,800	20,000
Network cable	206,100	711,000
Newspapers	(No data)	(No data)
Total	**$37,898,000**	**$45,149,000**

Marketing/brand management:
Natl rtl adv mgr, William Cora
Natl adv srvc mgr, Jack Lewis
Mgr natl media srvcs (magazines, bdcst), Bernie Miller
Mgr bdcst oper, Barbara Drier
Agencies: Ogilvy & Mather, Chicago
(retail and catalog advertising,

There's no business like the mature market business!

25% of our readers own 3 television sets, 38% own a 35mm camera, and 54% own an electric food processor.

50plus

850 THIRD AVE. • NEW YORK, NY 10022 • (212) 715-2781

network tv, network radio, spot tv and spot radio)
Exec vp-Pres (Chicago), Bill Whitney
Sr vp-managing dir, Wim Slootweg
Sr vp-grp mgmt supr, Al Mager
Vp-mgmt suprs: Robert Vail, Dan Delaney, Bruce Jasurda,
Acct suprs: Don Campbell, Jeff Totaro, Brenda Miller, Margaret Mooney, Ann Sundet, Steve Nance
Sr vp, media dir, Bill Behrmann
Vp assoc media dir, Tom Bell
Media suprs: Marklyn Kelly, Dave Flockencier
Media plnrs: Roman Martens, Dave Rasmussen, Lori Segal
Asst plnrs: JoAnn Farrington, Dina Kaplan, Julie Overman
Hispanic markets agency: Hispania/JWT, Chicago
Sr vp-gm, Caroline Demy (N.Y.)
Acct supr, Marta Perez-Gerdes
Media dir, Carlos Cintron (N.Y.) (N.Y.)

44. SEARS HOUSEHOLD ITEMS

Sears Roebuck & Co.

	Media investments	
	1986	1985
Magazines	$ 6,924,700	$ 2,129,000
Natl. Sun. mags.	1,581,900	—
Network tv	14,830,300	24,849,000
Spot tv	1,727,100	2,999,000
Network radio	12,225,300	8,064,000
Spot radio	—	—
Outdoor	5,000	19,000
Network cable	194,700	596,000
Newspapers	(No data)	(No data)
Total	**$37,489,000**	**$38,656,000**

Marketing/brand management:
Natl rtl adv mgr, William Cora
Natl adv srvc mgr, Jack Lewis
Mgr natl media srvcs (magazines, bdcst), Bernie Miller
Mgr bdcst oper, Barbara Drier
Agencies: Ogilvy & Mather, Chicago
(retail and catalog advertising network tv, network radio, spot tv and spot radio)
Exec vp-Pres Chicago, Bill Whitney
Sr vp-managing dir, Wim Slootweg
Sr vp-grp mgmt supr, Al Mager
Vp-mgmt suprs: Robert Vail, Dan Delaney, Bruce Jasurda
Acct suprs: Don Campbell, Jeff Totaro, Brenda Miller, Margaret Mooney, Ann Sundet, Steve Nance
Sr vp media dir, Bill Behrmann
Vp assoc media dir, Tom Bell
Media suprs: Marilyn Kelly, Dave Flockencier
Media plnrs: Roman Martens, Dave Rasmussen, Lori Segal
Asst plnrs: JoAnn Farrington, Dina Kaplan, Julie Overman
Hispanic markets agency: Hispania/JWT, Chicago
Sr vp-gm, Caroline Demy (N.Y.)
Acct supr, Marta Perez-Gerdes
Media dir, Carlos Cintron (N.Y.)

45. TOYOTA LOCAL DEALERS

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$19,887,400	$17,231,000
Network radio	—	—
Spot radio	—	—
Outdoor	2,345,500	1,740,000
Network cable	—	—
Newspapers	15,167,507	14,476,000
Total	**$37,400,407**	**$33,447,000**

Marketing/brand management:
Toyota Motor Sales U.S.A.:
Corp mktg dir, George Borst
Adv strtgy & media mgr, Jan Olson
Brand mgr, Kevin Flynn
Parent: Toyota Motor Co. Ltd.
Local Dealers
Agencies: Various

46. CHEVROLET PASSENGER CARS

(multi-product ads)

Chevrolet Motors Division

	Media investments	
	1986	1985
Magazines	$ 308,300	$ 1,401,000
Natl. Sun. mags.	—	880,000
Network tv	12,338,000	10,498,000
Spot tv	1,694,300	407,000
Network radio	5,163,600	494,000
Spot radio	14,109,909	—
Outdoor	230,200	416,000
Network cable	86,500	15,000
Newspapers	3,377,990	6,324,000
Total	**$37,308,799**	**$20,435,000**

Marketing/brand management:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Fld mktg mgr, Edd K. Roggenkamp III
Asst gen sls mgr, M. H. Erdman
Mktg mgr passenger cars, Thomas R. Mason
Mgr passenger car adv, Danielle K. Colliver
Parent: General Motors Corp.
Agency: Campbell-Ewald, Detroit
Exec vp-acct dir, Robert H. Schirmer
Grp sr vp-grp mgmt suprs: Donald D. Williams (cars), Anthony J. Hopp (regional)
Vp-acct supr, Michael Ryan
Exec vp-media dir, Louis M. Schultz
Sr vp-assoc media dir, James Birchfield
Sr vp-dir natl bdcst buying, Judy Sawyer
Sr vp-dir lcl mkt media, Robert Mitchell
Vp-media suprs: Barb Munro, Jack Winkleseth

47. DOMINO'S RESTAURANTS

Domino's Pizza Inc.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 19,495,800	$9,298,000
Spot tv	14,223,600	8,077,000
Network radio	—	195,000
Spot radio	2,234,566	1,909,095
Outdoor	642,600	829,000
Network cable	334,100	1,000
Newspapers	(No data)	(No data)
Total	**$36,930,666**	**$20,309,095**

Marketing/brand management:
Vp mktg, Sam Fine
Natl dir adv & fld mktg, Mike Raymond
Dir pub rel, Ron Hingst
Agency: Group 243, Ann Arbor, Mich.
Pres, Janet Muhleman
Vp-mktg srvcs, Bruce Smith
Acct supr, Lori Comparin

48. PONTIAC DEALERS ASSOCIATION FRANCHISE

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$35,698,300	$28,974,000
Network radio	—	—
Spot radio	419,603	137,482
Outdoor	46,500	25,000
Network cable	—	—
Newspapers	604,069	728,000
Total	**$36,768,472**	**$29,864,482**

Marketing/brand management:
Pontiac Div., General Motors Corp.:
Gm, J. Michael Losh
Gen sls & srvc mgr, E. M. Schlesinger
Dir mktg, J. D. Murray
Natl & dlr adv, E. H. Smith
Dlr mktg grps mgrs: (East, South) L. K. Anderson, (Central, West), M. M Dilworth
Parent: General Motors Corp. Dealers Association
Agencies: Various
(DMB&B Bloomfield Hills, MI handles Pontiac's national advertising)

49. NUPRIN PAIN RELIEF FORMULA TABLETS

Bristol-Myers Co.

	Media investments 1986	1985
Magazines	$ 4,887,600	$ 3,505,000
Natl. Sun. mags.	55,300	65,000
Network tv	30,035,100	22,162,000
Spot tv	426,400	1,815,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	851,600	875,000
Newspapers	70,710	32,000
Total	**$36,326,710**	**$28,454,000**

Marketing/brand management:
Sr vp sls & mktg, Stephen Bear
Grp prod mgr, Patricia Kriger
Mktg dir, Beth Culligan
Agency: Grey, New York
Sr vp, Herb Lieberman
Exec vp media & prog srvcs, Alec Gerster

50. COLUMBIA RECORD & TAPE CLUB

Columbia House

	Media investments 1986	1985
Magazines	$15,483,000	$15,518,000
Natl. Sun. mags.	11,047,900	10,045,000
Network tv	—	—
Spot tv	413,300	559,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	—	4,000
Newspapers	8,818,958	10,211,000
Total	**$35,763,158**	**$36,337,000**

PAIN RELIEF

Woman's World THE WOMAN'S WEEKLY

If you're looking to the Seven Sisters for relief, look again. Simmons* says Woman's World gives you greater percent composition of women users of pain relievers and headache remedies. Not to mention our heavier users of cold, allergy, and sinus remedies. And pain relievers for children. Feeling a dull ache? Call us for the cure at 212-953-3344.

*1986 SMRB

Unique every week

Marketing/brand management:
Vp-music mktg, Sharon Karoki
Dir music club adv, Joan Stamler
Dir compact disc club, Pam Lehman
Parent: CBS Inc.
Agency: Wunderman, Ricotta & Kline, N.Y.
Sr vp-grp dir, Peter Rabar
Vp-assoc media dir, Juliet Munoz-Darnell
Media supr, Bill Colihan

McDonald's leads the list with almost double the spending of the second-ranked advertiser, Burger King.

51. SEVEN-UP SOFT DRINK

The Seven-Up Co.

	Media investments	
	1986	1985
Magazines	—	$ 50,000
Natl. Sun. mags.	—	—
Network tv	19,690,700	12,312,000
Spot tv	8,227,500	6,392,000
Network radio	—	—
Spot radio	2,095,006	2.426,944
Outdoor	3,191,200	1,403,000
Network cable	716,500	529,000
Newspapers	1,762,893	579,000
Total	**$35,683,799**	**$23,691,944**

Marketing/brand management:
Sr vp mktg, Russ Klein
Dir brand mgmt, Bill Thompson
Mgr media svces, Nick Luciano
Parent: Hicks & Haas
Agency: Leo Burnett, Chicago
Sr vp-grp dir, John Miller
Vp-acct supr, Jack Woods
Acct exec, Paula McCloud
Sr vp media, Willard Hadlock
Vp-media dir, Dick Hobbs
Media supr, Kathy Grief
Minority agency: UniWorld, St. Louis
Acct supr, Ronald C. Owens
Media dir, Sherri Cherot
Mgmt supr Hispanic, Neil Campbell

52. COCA-COLA SOFT DRINK

Coca-Cola USA

(Not including Caffeine Free Coke, Cherry Coke, Coke Classic, Diet Coke, etc.)

	Media investments	
	1986	1985
Magazines	$ 61,400	$ 228,000
Natl. Sun. mags.	—	—
Network tv	11,540,800	24,587,000
Spot tv	13,218,900	22,483,000
Network radio	—	338,000
Spot radio	5,836,882	5,078,470
Outdoor	2,323,900	2,982,000
Network cable	1,732,100	1,335,000
Newspapers	921,698	2,551,000
Total	**$35,655,680**	**$59,582,470**

Marketing/brand management:
Sr vp mktg, John C. Reid
Grp brand dir, William Schermerhorn
Vp-corp media dir worldwide, William H. Lynn
Corp media mgr, John Drollinger
Brand mgr, Paul Porwoll
Parent: Coca-Cola Co.
Agency: McCann-Erickson, N.Y.
Exec vp-NY, John Dooner
Sr vp-grp mgmt dir, Ed Comiskey
Sr vp-mgmt rep, Robert Dunn
Acct exec, Susan Mitchell
Exec vp-worldwide media srvcs, Gordon Link
Exec vp-media dir, Ira Carlin
Vp-plng mgr, Stan Weinstein
Vp-assoc media dir, Kevin Mannion
Media grp head, Mike Delaney
Vp-worldwide coor, Ron Hatcher
Media supr, Vic Ruvolo
Media plnr, Jim Hommel
Worldwide coors: Sandra Familet, Chris Fay
Black agency: Burrell Advertising
Sr vp-gm William Sharp
Vp-acct supr, Neva Richardson
Acct exec, Barbara Jackson
Vp-media dir, Nick Howse
Media supr, Michelle Garner
Hispanic agency: Castor Spanish International, Inc.

53. DISCOVER CREDIT CARD SERVICE

Sears Roebuck & Co.

	Media investments	
	1986	1985
Magazines	$ 7,022,700	$ 426,700
Natl. Sun. mags.	—	—
Network tv	22,022,800	—
Spot tv	3,207,600	450,000
Network radio	2,568,900	—
Spot radio	285,044	163,182
Outdoor	67,900	—
Network cable	135,400	—
Newspapers	(No data)	(No data)
Total	**$35,310,344**	**$1,039,882**

Marketing/brand management:
Dir grp mktg, Nancy Donovan
Grp adv, Bill Walsh
Discover Card mktg, Bill Jalter
Discover Card adv, Ernie Campo
Agency: J. Walter Thompson, Chicago
Sr vp-grp dir, Bruce Beach
Sr vp-acct supr, Bill Hooe
Vp-acct supr, Dinny Cosyns
Sr-media, Bob Irvine
Vp-grp media dir, Honora Dee
Acct media dir, Mariclaire Haggarty

54. DIET COKE SOFT DRINK

Coca-Cola USA

	Media investments	
	1986	1985
Magazines	$ 189,800	$ 453,000
Natl. Sun. mags.	—	—
Network tv	18,612,300	18,486,000
Spot tv	13,542,100	12,835,000
Network radio	—	19,000
Spot radio	1,674,980	1,228,200
Outdoor	65,700	134 000
Network cable	822,300	292,000
Newspapers	301,706	551,000
Total	**$35,208,886**	**$33,998,200**

Marketing/brand management:
Sr vp mktg, John C. Reid
Grp brand mgr, Micheal Beindorff
Brand mgr, Daniel Sayre
Grp brand mgr, Virginia Rockwell
Asst brand mgr, Brian Lanahan
Agency: SSC&B, New York
Exec vp, F. Stone Roberts
Sr vp-mgmt supr, Donald Lenehan
Vp-acct supr, Michael Skoletsky
Acct execs: Brenda Brinker, Roger Fishman *(continued)*

Exec vp media, Robert Lilley
Media dir, Alan Jurmain
Vp-assoc media dir, Chris Gagen
Asst media dir, Lloyd Weber
Media plnr, Sarah Van Tuyl
Black agency: Burrell Advertising
Sr vp-gm William Sharp
Vp-acct exec, Neva Richardson
Acct exec, Barbara Jackson
Vp-media dir, Nick Howse
Media supr, Michelle Garner
Hispanic agency: Castor Spanish International, Inc.

55. NABISCO COOKIES

Nabisco Brands, Inc.
(Not including separate Fig Newton and Apple Newton advertising)

	Media investments 1986	1985
Magazines	$ 630,800	$ 2,713,000
Natl. Sun. mags.	408,800	22,000
Network tv	29,495,900	18,255,000
Spot tv	3,442,700	5,010,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	870,900	1,097,000
Newspapers	211,169	540,000
Total	**$35,060,269**	**$27,637,000**

Marketing/brand management:
Vp mktg, Harry Lees
Mktg dir, Bill Stuart
Grp prod dirs: Norman Vergara, Carol Lewbell Gray
Parent: RJR Nabisco Inc.
Agencies: DFS-Dorland, New York
(Almost Home, Chips Ahoy, Chewy Chips Ahoy)
Exec sr vp-mgt dir, Ray Caro
Sr vp-acct supr, Gay Clark
Acct suprs: Andy Gray, Marty Gertler, Jacqleen Farrell
Sr vp media, Lou Capozzoli
Exec vp-media dir, Allen Banks
Vp-assoc media dirs: Lucille Monaco, Deborah Engelhart, Diane Cimine

56. NBC TV NETWORK

National Broadcasting Co.

	Media investments 1986	1985
Magazines	$24,005,900	$25,761,000
Natl. Sun. mags.	379,600	292,000
Network tv	—	—
Spot tv	200	2,000
Network radio	2,012,300	1,638,000
Spot radio	349,217	179,150
Outdoor	69,900	107,000
Network cable	21,200	54,000
Newspapers	8,093,621	9,853,000
Total	**$34,931,938**	**$37,886,150**

Marketing/brand management:
Vp media plng & prom svces, Paul Wang (N.Y.)
Dir media plng, Marla Goldstein (Burbank)
(continued)

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Vp corp adv, Frank N. Pintauro (N.Y.)
Vp adv & prom, John Miller (Burbank)
Parent: General Electric Co.
Agency: Diener/Hauser/Bates, L.A./N.Y.
Exec vp media, Norman Trell (N.Y.)
West coast pres-acct mgmt supr, Eugene B. Cofsky
Sr vp-media dir, Cheryl Lodinger (N.Y.)
Vp-media dir, Nicky Shapiro (L.A.)
Media plnr, Joan Condon (L.A.)
Movies-of-the-Week & Mini-Series:
Acct supr-crtv dir, Melanie Paykos (L.A.)
Assoc acct supr-crtv dir, Jane Lodato (L.A.)

57. TOYOTA COMPACT TRUCKS

Toyota Motor Corp.

	Media investments	
	1986	1985
Magazines	$ 2,337,900	$ 1,773,000
Natl. Sun. mags.	286,400	—
Network tv	7,775,500	6,871,000
Spot tv	17,348,000	10,704,000
Network radio	—	74,000
Spot radio*	2,619,463	2,255,206
Outdoor	169,200	—
Network cable	957,700	1,146,000
Newspapers	3,214,132	1,512,000
Total	**$34,708,295**	**$22,080,000**

*M&MD estimates

Marketing/brand management:
Corp mktg dir, George Borst
Adv strategy & media mgr, Jan Olson
Adv mgr trucks, Don Cecconi
Agency: DFS Dorland/S. Calif. (Torrance)
Exec vp mgmt dir, Joe Cronin
Sr vp grp acct supr, Scott Gilbert
Acct supr, Jon Bucci
Acct execs: Cathy Moylan, Jim Floyd
Sr vp dir media ops, Richard Weigand
Sr vp media dir, Nora Lapham
Vp media dir, Katherine Galicich

58. CBS TV NETWORK

CBS/Broadcast Group

	Media investments	
	1986	1985
Magazines	$27,154,300	$29,894,000
Natl. Sun. mags.	1,021,100	818,000
Network tv	—	—
Spot tv	40,300	120,000
Network radio	556,800	888,000
Spot radio	3,238,390	379,694
Outdoor	—	20,000
Network cable	43,700	94,000
Newspapers*	2,604,471	2,643,000
Total	**$34,658,261**	**$34,856,694**

*M&MD estimates

Marketing/brand management:
CBS TV Network, CBS News, CBS Sports, CBS Broadcast International:
Vp adv, Douglas C. Clemenson
CBS Entertainment:
Acting vp-adv & prom, Jerry Goldberg
Parent: CBS Inc.
Agencies: DDB/Needham Worldwide, New York
Corporate media planning:
Sr vp-dir media plng & operations, Paul Zuckerman
Vp-dir newspaper/outdoor media buying, Jack Cohen
Media plnr, Molly Dweck
Jacobs & Gerber, Los Angeles
CBS News:
Vp-acct srvcs, Alison R. Harris
Ogilvy & Mather, Los Angeles
CBS Entertainment:
Sr vp-exec media dir, Ron Reilly
Vp-mgmt suprv, Susan Chittum
Vp-assoc media dir, Jeff Curtis
Asst media dir, Arlene Colbert

59. TV GUIDE CIRCULATION

TV Guide Magazine

	Media investments	
	1986	1985
Magazines	—	$ 14,000
Natl. Sun. mags.	—	—
Network tv	$2,336,600	1,535,000
Spot tv	24,006,400	24,389,000
Network radio	6,017,400	7,523,000
Spot radio	97,118	156,665
Outdoor	—	—
Network cable	947,300	1,678,000
Newspapers	823,988	1,369,000
Total	**$34,228,806**	**$36,664,665**

Marketing/brand management:
Pub, Eric Larson
Prom dir, Fred Jervis
Adv prom, Barry Pennell
Consumer prom, Jay Werner
Parent: Triangle Publications
Agency: NW Ayer New York
Sr vp acct dir, Howard Stoner
Vp mgnt supr, George Malcomson
Sr vp grp media dir, David Lehmkuhl
Assoc media dir, Debbie-Lisa Brown
Media supr, Gay Macleod

60. DIET PEPSI SOFT DRINK

Pepsi-Cola, U.S.A.

	Media investments	
	1986	1985
Magazines	$ 526,600	$ 1,008,000
Natl. Sun. mags.	—	—
Network tv	6,294,200	9,147,000
Spot tv	24,566,200	21,269,000
Network radio	—	—
Spot radio	2,320,322	1,893,442
Outdoor	44,100	39,000
Network cable	95,400	81,000
Newspapers	375,677	73,000
Total	**$34,222,499**	**$33,510,442**

Marketing/brand management:
Pres, Roger Enrico
Sr vp crtv srvcs, Alan Pottasch
Vp mktg, Mike Lorelli
Adv mgr, Jeff Myers
Media dir, Rich Roch
Assoc media dir, Mary Ann Power
Parent: PepsiCo Inc.
Agency: BBDO, New York
Exec vp-sr mgmt rep, Gary DePaolo
Sr vp-mgmt supr, Bill Katz
Exec vp-dir media srvcs, Arnie Semsky
Sr vp-dir media plng srvcs, Mike Drake
Sr vp-dir net tv & prog, Steve Grubbs
Sr vp-assoc media dir, Ivan Becker
Vp-assoc network dir, Stu Schlossman
Media suprs: Rene Goldmuntz, May Ann Cunningham
Media plnr, Mike Giarraputo
Ethnic creative agency: Mingo-Jones, N.Y.
Sr vp-dir client srvcs, Samuel Chisolm
Acct exec, Eric Randolph

61. GALLO WINES

E & J Gallo Winery

	Media investments 1986	1985
Magazines	$ 4,700	$ 545,500
Natl. Sun. mags.	—	61,400
Network tv	32,045,400	13,079,600
Spot tv	1,559,100	101,200
Network radio	—	—
Spot radio	—	33,456
Outdoor	24,400	—
Network cable	110,600	—
Newspapers	240,805	323,729
Total	**$33,985,005**	**$14,144,885**

Marketing/brand management:
Vp-mktg, David Gallo
Vp-brand mgmt, Gerry Glascow
Sr brand mgrs, Doug Rogers, Jim Stanley
Vp-ad srvcs, Jack McBride
Vp-media dir, Sue McClelland
Agency: Hal Riney, San Francisco
Sr vp-grp dir, Sam Hershfield
Vp-acct supr, Marty Wenzell
Vp-media, David Verklin
Assoc media dir, Jeanette Gatto
Media plnr, Rick Boyce

62. HARDEE'S RESTAURANTS

Hardee's Food Systems, Inc.

	Media investments 1986	1985
Magazines	—	$ 15,000
Natl. Sun. mags.	—	—
Network tv	—	8,925,000
Spot tv	$29,445,600	23,288,000
Network radio	58,500	—
Spot radio	$2,740,012	2,263,709
Outdoor	1,617,300	1,365,000
Network cable	8,000	(No data)
Newspapers	(No data)	(No data)
Total	**$33,869,412**	**$35,856,709**

Marketing/brand management:
Exec vp-mktg, Gary L. Langstaff
Vp-field mktg, Dennis MacKee
Agency: Ogilvy & Mather, N.Y.
Sr vp-grp dir, Dave Warden
Vp-assoc media dir, Alan Orlick
Asst media dir, Mike Pierce

63. AT&T CORPORATE

American Telephone & Telegraph Co.

	Media investments 1986	1985
Magazines	$ 10,542,600	$9,685,000
Natl. Sun. mags.	60,800	—
Network tv	11,986,000	22,490,000
Spot tv	2,178,700	2,132,000
Network radio	3,379,100	6,188,000
Spot radio	4,690,279	80,594
Outdoor	—	—
Network cable	264,700	411,000
Newspapers	281,272	1,313,000
Total	**$33,383,451**	**$42,299,594**

Marketing/brand management:
Adv & media director, R.W. Watson
Corp media mgr, J.D. Speros
Corp broadcast mgr, D.K. Ritter
Div mgr, R.Z. Manna
District mgrs: J. R. Byrne, L. Urben, A. M. Winters, D. Robertson
Staff mgr, J. Finore
Agencies: NW Ayer, New York
Sr vp-exec acct dir, R. Wooden
Sr vp-mgmt supr, F. McClafferty
Ogilvy & Mather, New York (Intl.)
Sr vp-grp dir, G.K. O'Dea
Sr vp, mgmt supr, C. Round
Acct supr, J. Blocklin
Minority/college recruitment agency: Uniworld, New York
Sr vp-gen mgr, H. Morales
Vp-acct supr, L. Dukette

64. COORS LIGHT BEER

Adolph Coors Co.

	Media investments 1986	1985
Magazines	—	$ 25,000
Natl. Sun. mags.	—	—
Network tv	19,119,500	5,574,000
Spot tv	10,498,300	12,547,000
Network radio	—	—
Spot radio	2,300,724	2,437,980
Outdoor	309,500	233,000
Network cable	673,900	764,000
Newspapers	193,381	57,000
Total	**$33,095,305**	**$21,637,980**

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The Columbus Dispatch
Morning & Sunday

Represented Nationally by Cresmer, Woodward, O'Mara & Ormsbee, Inc.

Source: 1986 S&MM Survey of Buying Power, Columbus Market Profile, [illegible] 1986

Marketing/brand management:
Exec vp sls & mktg, Robert A. Recholtz
Vp mktg, Rob Klugman
Brand dir, Bob Fox
Brand mgr, June Smith
Vp mktg devel, Gary Truitt
Agency: Foote, Cone & Belding, Chicago
Sr vp-grp acct dir, Bill Melzer
Vp-acct dirs: Jim Gregga, Randy Windschit, Dave Haan
Acct dirs: Jim Mitchel, Larry McIntosh, Dave Sollitt, Ed Moser, Pam Crowson-Brash
Acct execs: Tim O'Connor, Will Hodgman, John Malkin, Gil Duff, Kevin O'Rourke
Sr vp media, Fred Wray
Vp-grp media dir, Kent Vlautin
Media suprs: Mary Salmich, Steve Vye, Mary Hanley, Judith Salas
Hispanic markets agency: GSD&M, Austin, TX
Chmn, Steve Gurasich
Sr vp, Chuck Grady
Dir Hispanic srvcs, Raoul Rodriguez
Corp & pub affrs dir, Hank Olguin
Vp-assoc media dir, Tina Williamson

65. MICHELOB LIGHT BEER

Anheuser-Busch, Inc.

	Media investments 1986	1985
Magazines	$ 2,663,300	$ 2,097,000
Natl. Sun. mags.	—	—
Network tv	18,223,500	14,392,000
Spot tv	7,518,700	6,775,000
Network radio	705,300	136,000
Spot radio	949,612	1,616,024
Outdoor	190,500	73,000
Network cable	2,646,600	1,500,000
Newspapers	45,079	5,000
Total	**$32,942,591**	**$26,594,024**

Marketing/brand management:
Exec vp dir mktg, Michael J. Roarty
Vp brand mgmt, Jack MacDonough
Vp corp media/sports mktg, Charles B. Fruit
Grp mktg mgr, Robert Goughenour
Sr prod mgr, Jack Hanzolic
Agency: DDB/Needham Worldwide, Chicago
Acct supr, Senn Moses
Sr vp-mgmt rep, Don Richards
Acct exec, Tony Sciolla
Asst acct exec, Beth Kennedy
Dir acct mngt, Gene Yovatich
Vp assoc media dir, Geoffrey McClelland
Media supr, Michael Murphy
Media plnrs: Kristine King, Mark Sneider
Hispanic Agency: Castor Spanish International Inc.

66. HONDA CIVIC

American Honda Motor Co.

	Media investments 1986	1985
Magazines	$ 5,638,400	$ 2,979,000
Natl. Sun. mags.	30,400	—
Network tv	19,026,000	7,903,700
Spot tv	4,563,800	472,000
Network radio	1,239,500	1,060,900
Spot radio*	910,334	626,589
Outdoor	300	—
Network cable	1,202,600	867,400
Newspapers*	329,292	221,651
Total	**$32,940,626**	**$14,131,240**

*M&MD estimates

Marketing/brand management:
Sr vp auto fld sls, Jack Billmyer
Sr vp auto sls oper, Tom Elliott
Mgr auto adv, Eric Conn
Asst mgr-auto adv, Mike Dillon
Exec vp, K. Amemiya
Agency: Rubin Postaer & Associates, LA
Sr vp-grp acct dir, William C. Hagelstein
Vp-acct dir, Chuck Valentine
Vp-acct suprs: Julie Boston, Joan Egan
Acct supr, Ron MacMillan
Vp-assoc media dir, Stanley Botello

67. VANTAGE KING CIGARETTES

R.J. Reynolds Tobacco Co.

	Media investments 1986	1985
Magazines	$14,530,200	$18,218,000
Natl. Sun. mags.	3,708,500	2,770,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	11,777,600	$7,634,000
Network cable	—	—
Newspapers	2,613,383	5,315,000
Total	**$32,629,683**	**$33,937,000**

Marketing/brand management:
Sr vp brand mktg, J. T. Winebrenner
Mktg dir, R. M. Sanders
Sr brand mgr, A.T. Sterling
Dir media, Dan Pearson
Grp mgr media admin, R. E. Neal
Parent: RJR Nabisco Inc.
Creative agency: FCB/Leber Katz Partners, N.Y.
Exec vp-grp mgmt dir, Robert Hirsch
Vp-mgmt dir, Angelika Adler
Acct dir, Robin Palazzo
Acct exec, Dan Howald

68. NORTHWEST AIRLINES

(Includes Northwest Airlines & Northwest Orient. Republic Airlines not included)

	Media investments 1986	1985
Magazines	$ 8,219,300	$ 3,205,700
Natl. Sun. mags.	144,400	54,600
Network tv	938,300	—
Spot tv	3,313,200	1,001,200
Network radio	587,000	—
Spot radio	2,290,008	3,884,018
Outdoor	832,400	381,100
Network cable	115,500	—
Newspapers	16,100,597	16,773,419
Total	**$32,540,705**	**$25,300,037**

Marketing/brand management:
Vp adv, Bryan G. Moon
Mgr mktg comm, Judith Mitchells
Agency: DFS Dorland Worldwide, N.Y.
Exec vp mgmt supr, Michael Keeshan

69. CHEVROLET DEALERS ASSOCIATION FRANCHISE

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$27,382,900	$26,149,000
Network radio	—	—
Spot radio	$1,171,037	$ 772,043
Outdoor	3,700	175,000
Network cable	—	—
Newspapers	2,961,863	3,694,000
Total	**$31,519,500**	**$30,790,043**

(continued)

Marketing/brand management:
Chevrolet Div., General Motors:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Asst gen sls mgr, M. H. Erdman
Mktg mgrs: Ed K. Roggenkamp III (fld), Thomas R. Mason (passenger cars), John M. Kelley (trucks)
Mgrs adv: Danielle K. Colliver (passenger cars), Thomas P. Cutler (trucks)
Asst mgr fld mktg, J. D. Tidwell, Jr.
Parent: General Motors Corp. Dealers Association
Agencies: Various
Chosen by 157 dealer associations.

70. SLICE REGULAR SOFT DRINK

PepsiCo Inc.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	27,525,200	12,392,500
Network radio	—	—
Spot radio	1,881,282	941,110
Outdoor	151,700	346,900
Network cable	27,300	—
Newspapers	1,715,264	560,964
Total	**$31,300,746**	**$14,241,474**

Marketing/brand management:
Pres, Roger Enrico
Sr vp crtv svces, Alan Pottasch
Vp mktg, Mike Lorelli
Adv mgr, Jeff Myers
Media dir, Rick Rock
Assoc media dir, Mary Ann Power
Agency: J. Walter Thompson, New York
Sr vp grp dir, Jerry Gottlieb
Vp acct dir, Jeremy Birkbeck
Vp acct supr, Kendall Crolius
Acct exec, Michelle Ganon
Exec vp U.S. dir media svces, Richard Kostyra
Sr vp dir media plng, John Gray
Vp assoc media dir, Ronnie Beason
Media supr, Karen Bress
Media plnrs: Tom Annear, Glen Caruso

71. BARTLES & JAYMES WINE COOLER

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$26,582,600	13,304,000
Spot tv	3,759,600	3,883,000
Network radio	—	—
Spot radio	721,522	25,740
Outdoor	—	—
Network cable	27,200	—
Newspapers	82,476	—
Total	**$31,173,398**	**17,212,740**

Marketing/brand management:
Vp mktg, David Gallo
Vp brand mgmt, Gerry Glasgow
Sr brand mgr, Craig Battisfore
Media dir, Sue McClelland
Dir corp comm, Dan Solomon
Parent: E. & J. Gallo Winery
Agency: Hal Riney, San Francisco
Sr vp-grp dir, Sam Hershfield
Vp acct supr, Marty Wenzell
Vp-media dir, David Verklin
Assoc media dir, Jeanette Gatto
Media plnr, Rick Boyce
Vp-ad srvcs, Jack McBride

72. GENERAL MOTORS CORPORATE

General Motors Corp.

	Media investments 1986	1985
Magazines	$ 9,956,400	$ 1,933,000
Natl. Sun. mags.	416,100	—
Network tv	12,931,300	11,360,000
Spot tv	2,670,200	4,479,000
Network radio	4,139,700	706,000
Spot radio	144,176	97,019
Outdoor	8,600	—
Network cable	189,100	276,000
Newspapers	279,808	3,150,000
Total	**$30,735,384**	**$22,001,019**

Marketing/brand management:
Vp mktg & prod plng, J.G. Middlebrook
Exec dir adv srvcs, P. Guarascio
Gen dir, media operations, M.A. Browner
Dir adv, D. J. Teasdale
Asst adv mgr, D. P. Bolen
Adv supr, M. G. Wright
Vp pub rel, J. W. McNulty
Dir pub affairs adv, G. H. Pruette
Sr staff asst (pub affairs), R. Thomas Beaman
Mgr crtv srvcs (pub affairs), H. Wells
Agencies: D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich.
Exec vp-mgmt supr, T. T. Teegarden
Vp-acct supr, W. A. Mara
Vp rtl comm, A. R. Harrington
Sr vp-media dir, G. M. Rogers
Vp-grp media dir, E. M. Coosia
NW Ayer, Detroit
Public affairs:
Sr vp-mging dir, Robert Kingsbury
Sr vp-mgmt supr, Richard Prince
Vp-media dir, Randall Schroeder
Assoc media dir, Rick Doyle
Minority marketing agency: Mingo-Jones, N.Y.
Acct supr, S.J. Chisholm
Media dir, Ray Brown

Eleven domestic beers are in the 1986 Top 200.

73. PEOPLE EXPRESS AIR SERVICE

Texas Air Corp.

	Media investments 1986	1985
Magazines	$ 1,678,700	$ 2,736,700
Natl. Sun. mags.	—	128,600
Network tv	—	—
Spot tv	1,167,700	2,165,200
Network radio	—	—
Spot radio	16,377,109	2,342,707
Outdoor	1,249,400	1,589,000
Network cable	—	—
Newspapers	9,918,613	26,012,494
Total	**$30,391,522**	**$34,974,701**

Marketing/brand management:
(People Express Airlines has merged with Airlines Corp.)
(Continental)
Chm CEO, Frank Lorenzo
Vice chm, Howard Swanson
Vp pub rels, W. J. Moran
Agency: Scali, McCabe, Sloves
(For Continental)
Mgmt supr, Mark Messing
Acct supr, Suzanne Secor

74. DURACELL BATTERIES

Duracell, Inc.

	Media investments 1986	1985
Magazines	$ 1,899,200	$ 4,004,000
Natl. Sun. mags.	294,900	—
Network tv	23,764,900	16,493,000
Spot tv	1,719,700	1,332,000
Network radio	1,799,900	—
Spot radio	—	110,769
Outdoor	400	—
Network cable	52,500	166,000
Newspapers	497,905	30,000
Total	**$30,029,405**	**$22,135,769**

Marketing/brand management:
Vp mktg, Charles Kiernan
Cons grp prod mgr, Kevin Kelley
Sr prod mgr, Robert Giacolone
Specialty grp prod mgr, Mark Lucas
Parent: Kraft Inc.
Agency: Ogilvy & Mather, N.Y.
Sr vp-grp dir, Jack Reed
Vp-mgmt supr, Philippe Defechereux
Vp-acct supr, Kathy Moriarity
Vp-assoc media dir, Mark Rice
Asst media dir, Lisa Gallant

75. MERCURY SABLE

Lincoln-Mercury Division of Ford Motor Co.

	Media investments 1986	1985
Magazines	$ 5,958,700	$ 1,370,700
Natl. Sun. mags.	211,700	731,000
Network tv	16,293,200	$5,403,900
Spot tv	1,697,000	453,800
Network radio	4,639,400	—
Spot radio	51,716	—
Outdoor	54,000	4,800
Network cable	550,800	84,300
Newspapers	248,161	1,279,180
Total	**$29,704,677**	**$9,327,680**

Marketing/brand management:
Vp gm, Tom Wagner
Mktg mgr, Edsel Ford
Adv mgr, Sheldon Wardwell
Agency: Young & Rubicam, Detroit
Sr vp grp dir, Chuck Riley
Vp mgmt supr, Tim Hart
Sr vp media, Ken Pool
Grp media supr, Marge Forbes

76. IBM CORPORATE

International Business Machines Corp.

	Media investments 1986	1985
Magazines	$ 6,827,600	$ 6,083,000
Natl. Sun. mags.	508,500	498,000
Network tv	18,743,600	17,384,000
Spot tv	1,292,700	682,000
Network radio	249,400	—
Spot radio	1,674,136	—
Outdoor	—	—
Network cable	323,600	124,000
Newspapers	67,077	314,000
Total	**$29,686,613**	**$25,085,000**

Marketing/brand management:
Dir adv & prom, J. C. Daily
Dir adv oper, J. F. King
Dir adv pgms, W. P. Barton
Mgr tv adv & prom, M. C. Gury
Mgr print adv, R. W. W. Baker
Agency: Lord, Geller, Federico, Einstein, N.Y.
Sr vp-acct dir, Bill Wardell

77. LONG JOHN SILVER'S RESTAURANTS

Jerrico, Inc.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 2,491,500	—
Spot tv	26,577,300	$ 26,304,000
Network radio	—	—
Spot radio	182,634	364,846
Outdoor	240,500	278,000
Network cable	139,400	—
Newspapers	(No data)	(No data)
Total	**$29,631,334**	**$26,946,846**

Marketing/brand management:
Exec vp & chf mktg officer, Thomas Gruber
Exec vp mktg, Anthony M. Lavely
Vp prod mktg, Donald A. Metznik
Prod mktg dirs: Mike Kupstas, Larry Smith
Vp fld mktg, Lee F. Hardy
Agencies: Abbott Advertising, Lexington, Ky.
(in-house)
Vp gen mgr, David M. Miller

78. BUSCH BEER

Anheuser-Busch, Inc.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$15,145,600	$15,658,000
Spot tv	10,016,500	5,729,000
Network radio	—	—
Spot radio	1,933,136	1,296,206
Outdoor	1,504,300	1,035,000
Network cable	661,300	13,000
Newspapers	303,690	237,000
Total	**$29,564,526**	**$23,968,206**

Marketing/brand management:
Exec vp mktg, Michael J. Roarty
Vp brand mgmt, Jack MacDonough
Vp corp media/sports mktg, Charles B. Fruit
Grp brand dir, Bob Merz
Sr brand mgr, Mike Owens
Prod mgr, Mike LaBroad
Agency: DDB/Needham Worldwide, Chicago
Mgmt rep, John Greening
Acct supr, Bob Lachky
Acct exec, Michael Holsinger
Asst acct exec, Diana Fiedotin

79. ZALE'S JEWELRY

Zale Corp.

	Media investments 1986	1985
Magazines	$ 1,549,800	$ 601,000
Natl. Sun. mags.	135,200	17,000
Network tv	17,217,300	8,853,000
Spot tv	3,296,600	3,860,000
Network radio	5,783,100	3,913,000
Spot radio	1,058,862	4,813,356
Outdoor	—	—
Network cable	236,000	90,000
Newspapers	(No data)	(No data)
Total	**$29,276,862**	**$22,147,356**

Marketing/brand management:
Sr vp mktg & adv Patti Rakolta
Adv dir, Becky Higgins
Adv mgrs: Lisa Parets, Katie Hallet
Agency: The Bloom Agency, Dallas
Sr vp mgmt supr, Sherri Babcock
Acct supr, Betty Tapella
Acct exec, Mary Kay Riordon
Vp media, Dave Tracy
Grp media dir, Deb Gugel

80. MASTERCARD CREDIT CARD SERVICES

Mastercard International

(Not including regional tv and ads solely for Gold card, international services and travelers checks)

	Media investments	
	1986	1985
Magazines	$ 1,170,300	$ 179,000
Natl. Sun. mags.	33,500	—
Network tv	21,508,600	16,346,000
Spot tv	3,626,400	2,902,000
Network radio	2,080,400	—
Spot radio*	172,676	51,423
Outdoor	—	—
Network cable	607,100	398,000
Newspapers	(No data)	(No data)
Total	**$29,198,976**	**$19,876,423**

*M&MD estimates

Marketing/brand management:
Sr vp card & trvl prod, F. Alan Schultheis
Sr vp mktg srvcs, Joanne Black
Vp adv, Susan Burke
Agency: SSC&B: Lintas Worldwide
Exec vp & chair of strategy review brd, F. Stone Roberts
Sr vp-dir grp media oper, Loretta Volpe
Mgmt supr, Nancy Korda

81. KODAK FILM

Eastman Kodak Co.

	Media investments	
	1986	1985
Magazines	$ 5,382,300	$ 3,886,000
Natl. Sun. mags.	316,700	—
Network tv	18,217,500	15,373,000
Spot tv	2,317,800	5,298,000
Network radio	—	806,000
Spot radio*	464,849	1,253,313
Outdoor	824,400	508,000
Network cable	838,100	1,196,000
Newspapers	814,774	493,000
Total	**$29,176,423**	**$28,813,313**

*M&MD estimates

Marketing/brand management:
Vp gm (consumer prod div), Peter Palermo
Vp gm mktg (consumer prod div), Jack Powers
Dir mktg comm svces, Richard S. Bartlett
Dir worldwide mktg comm, George Conte
Dir mktg comm & support svces, Bruce Wilson
Mktg comm dir (film prod), Carole Hancock

Agency: J. Walter Thompson, N.Y.
Sr vp worldwide mngt dir, Jerry Gottlieb
Vp acct dir, Mitchell Brooks
Sr acct supr (intl), Ernie Emerling
Acct supr, Rich O'Leary
Acct execs: Jeff Bodenmann, Susan Moonitz
Acct coordinator, Anna DeRusha
Exec vp, U.S. dir media, Richard Kostyra
Sr vp dir media plng, John Gray
Sr vp dir ntwk neg, John Sisk
Vp assoc media dirs: Emily Swartzentruber (plng),
Gwyn Kaufman (neg)
Media supr, Vicky Roschen
Mgr b-to-b media, Bert Peller

82. FORD PASSENGER CARS

(multi-product ads)

Ford Motor Co.

	Media investments	
	1986	1985
Magazines	$ 1,283,700	$ 648,000
Natl. Sun. mags.	—	—
Network tv	11,086,200	9,479,000
Spot tv	9,538,900	5,252,000
Network radio	—	1,000
Spot radio	434,241	157,773
Outdoor	372,600	535,000
Network cable	239,100	89,000
Newspapers	5,653,817	2,927,000
Total	**$28,608,558**	**$19,088,773**

Marketing/brand management:
Ford Division:
Vp-gm, R.L. Rewey
Gen mktg mgr, R.H. Roberts
Adv mgr, John Vanderzee
Car ad mgr, R. J. Gillooly
Dealer ad mgr, H.S. Wilson

Agency: J. Walter Thompson, Detroit
Exec vp-gm, Peter Schweitzer
Sr vp-acct dir, Chuck Balestrino
Sr vp-creat dir, Richard Howting
Sr vp-dir mktg srvcs, Robert Gamble
Sr vp-bdcst supr, Ron Fredrick
Sr vp-media dir, Thomas E. Healey
Vp-car & truck grp media dir, Paul Hunt
Hispanic market agency: Hispania/ JWT, New York
Sr vp-gm, Alfredo Jarrin
Acct supr, Andrea Doren
Media dir, Carlos Cintron
Acct exec, Ivan Pichardo
Black agency: Burrell Advertising
Vp-mgmt supr, Don Coleman
Acct exec, Esther Terrell
Vp-media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

> **Four wine coolers made the Top 200, but only one wine marketer outside of the cooler case made the list: Gallo.**

83. PAN AM WORLD AIRWAYS

	Media investments	
	1986	1985
Magazines	$ 3,230,700	$ 3,643,200
Natl. Sun. mags.	453,100	174,100
Network tv	16,000	—
Spot tv	3,510,100	4,514,100
Network radio	—	—
Spot radio	1,941,454	2,728,738
Outdoor	918,000	1,695,800
Network cable	302,200	212,200
Newspapers	18,217,679	20,872,348
Total	**$28,589,233**	**$33,840,486**

Marketing/brand management:
Sr vp mktg, John Krimsky
Sr vp pass svce, Donald Parker
System adv dir, John Bloodworth
US adv dir, Robert Morris
Agency: Wells, Rich, Greene, Inc., N.Y.
Exec vp, Andre van Strom
Mgmt supr, Eileen McKenna
Acct suprs: L. Farrand, B. Lazetera, M. Antonetti, C. Holmes J. Carlson, N. Roslin, A. DeFranco, J. DeFeo

84. **FORD ESCORT CAR**

Ford Motor Co.

	Media investments 1986	1985
Magazines	$ 6,900,200	$ 8,370,000
Natl. Sun. mags.	—	—
Network tv	17,461,300	17,603,000
Spot tv	3,011,200	3,079,000
Network radio	—	—
Spot radio	67,501	—
Outdoor	324,100	102,000
Network cable	461,500	433,000
Newspapers	67,962	824,000
Total	**$28,313,763**	**$30,411,000**

Marketing/brand management:
Ford Division:
Vp-gm, R.L. Rewey
Gen mktg mgr, Ross Roberts
Adv mgr: John Vanderzee
Car ad mgr, R.J. Gillooly
Dealer ad mgr, H.S. Wilson
Agency: JWT, Detroit, MI
Exec vp-gm, Peter Schweitzer
Sr vp-acct dir, Chuck Balestrino
Sr vp-creat dir, Richard Howting
Sr vp-dir mktg srvcs, Robert Gamble
Sr vp-brdcst neg, Ron Fredrick
Sr vp-media dir, Thomas E. Healey
Vp- car & truck grp media dir, Paul Hunt
Hispanic markets agency: Hispania/JWT, N.Y.
Sr vp-gm, Alfredo Jarrin
Acct supr, Andrea Doren
Media dir, Carlos Cintron
Acct exec, Ivan Pichardo
Black agency: Burrell Advertising
Vp-mgmt supr, Don Coleman
Acct exec, Esther Terrell
Vp-media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

85. **TIDE POWDER DETERGENT**

The Procter & Gamble Co.

	Media investments 1986	1985
Magazines	$ 3,039,400	$ 2,761,000
Natl. Sun. mags.	—	—
Network tv	13,376,300	9,886,000
Spot tv	11,189,600	9,912,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	26,000
Network cable	353,600	590,000
Newspapers	217,753	272,000
Total	**$28,176,653**	**$23,447,000**

Marketing/brand management:
Vp div mgr, B. L. Byrnes (packaged soaps & detergents)

Agency: Saatchi & Saatchi, N.Y.
Exec vp-mgmt dir, Paula Forman
Mgmt supr, Jeffrey Zeiler
Acct supr, John Geoghegan
Acct exec, Paul Guagliardo
Asst acct exec, Bonnie Hutchinson
Sr vp-U.S. media dir, Carol Karasick

86. **PENNEY'S MISCELLANEOUS BRANDS**

(multi-product ads not fitting into other LNA categories)

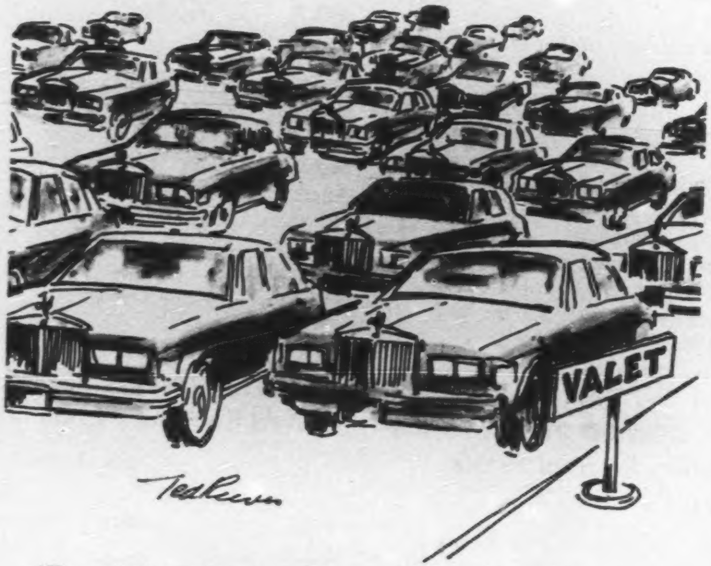
J.C. Penney Co.

	Media investments 1986	1985
Magazines	$ 479,500	$ 97,000
Natl. Sun. mags.	69,700	9,000
Network tv	22,523,500	19,614,000
Spot tv	2,849,600	4,498,000
Network radio	—	—
Spot radio*	874,911	—
Outdoor	17,000	91,000
Network cable	777,100	155,000
Newspapers	(No data)	(No data)
Total	**$27,591,311**	**$24,464,000**

*M&MD estimates

Marketing/brand management:
Vp-dir corp mktg, J. Wells

Where there's no smoke . . . only one cigarette made the top 50 brands: Yves St. Laurent 100's.



"Dear, I thought you said we'd stand out from the crowd when we bought this car."

The nation's largest Rolls Royce dealership is located in Orange County and The Orange County Register carries more full-run automotive advertising than any other Southern California newspaper. (Media Records, 1986)

THE ORANGE COUNTY
Register
METROGROUP

The leading medium in Southern California's richest market. Represented by CWO&O

Mgr mktg comm, William McCarthy
Mgr media srvcs, James F. Boynton
Natl media plnr, Dave Wood
Adv mgr, Edward Hayward
Catalog Division:
Sr vp-dir, Rod Birkins
Dir cat mdsg, Julius Debbs
Mgr cat mktg, Bill Nolta
Dir cat adv & pubs, William Kelly
Agency: NW Ayer, New York
Retail:
Sr vp-mgmt supr, Andrew Anderegg
Vp-acct supr, Meryl Nierman
Sr vp-grp media dir, A. Brivic
Vp-assoc media dir, Sue Kaufman

87. SNICKERS CANDY BAR

Mars Inc.

	Media investments 1986	1985
Magazines	$ 1,971,700	$ 1,655,000
Natl. Sun. mags.	—	—
Network tv	15,312,600	14,319,000
Spot tv	5,531,300	6,365,000
Network radio	1,574,700	1,909,000
Spot radio	—	283,556
Outdoor	—	—
Network cable	3,157,400	1,492,000
Newspapers*	19,190	39,000
Total	**$27,566,890**	**$26,062,556**

*M&MD estimates

Marketing/brand management:
Pres, Howard Walker
Sr vp, J. Langdon
Agency: Ted Bates, N.Y.
Sr vp-mgmt rep, Pam Marcus
Vp-acct supr, Janet Stanton
Acct exec, Johann Becker
Sr vp-media dir, Barry Kaplan

88. CENTURY 21 REAL ESTATE

Century 21 Real Estate Corp.

	Media investments 1986	1985
Magazines	$ 381,600	$ 750,000
Natl. Sun. mags.	—	—
Network tv	21,557,400	17,892,000
Spot tv	3,568,700	2,058,000
Network radio	—	—
Spot radio	1,893,451	1,822,026
Outdoor	63,500	27,000
Network cable	300	—
Newspapers	—	—
Total	**$27,464,951**	**$22,549,026**

Marketing/brand management:
Sr vp-mktg & adv, Bruce Oseland
Brand mgr, Marty Barrett
Parent: Metropolitan Life Insurance Co.
Agency: McCann-Erickson, L.A.
Sr vp-mgmt rep, Jim Dorsey
Reg vp-acct dir, Joe Van Sickle
Reg acct supr, Sherri Sprecher
Natl vp-acct dir, Bob Sutter
Natl acct supr, Colin Schleining
Media supr, Tom O'Brien

89. HYUNDAI EXCEL

Hyundai Group

	Media investments 1986	1985
Magazines	$ 4,736,300	—
Natl. Sun. mags.	—	—
Network tv	4,003,500	—
Spot tv	17,913,600	—
Network radio	—	—
Spot radio*	27,612	—
Outdoor	17,200	—
Network cable	—	—
Newspapers*	665,185	—
Total	**$27,363,397**	—

*M&MD estimates

Marketing/brand management:
Dir mktg, Jack Collins
Natl adv mgr, Joe Corey
Media dlr assoc mgr, Tom Meyers
Agency: Backer & Spielvogel
Vp-acct dirs: Howard Sherman, Peter Smaha
Media dir, Kevin Coyne
Sr acct exec, Paula Dyba

90. TYLENOL EXTRA STRENGTH CAPLETS

McNeil Consumer Products

	Media investments 1986	1985
Magazines	1,953,900	1,625,100
Natl. Sun. mags.	—	94,500
Network tv	$23,293,400	$4,883,600
Spot tv	774,300	268,300
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	1,090,000	175,400
Newspapers*	27,267	—
Total	**$27,138,867**	**$7,046,900**

Marketing/brand management:
Exec vp gm, Chandler D. Simonds
Dir prod mgmt, Jim T. Lenehan
Group prod dir, Brian D. Perkins
Prod dir, Tony A. Vernon
Asst prod dirs: R. L. Fugate, D. M. Casey, E.F. Schnitzler
Parent: Johnson & Johnson
Agency: Saatchi & Saatchi Compton Inc., N.Y.
Exec vp-grp dir, Thomas Lom
Vp-mgmt supr, Patrick Furey
Acct exec, Ellen Rothschild
Asst acct execs: Mike Johnson, Stanley Yorker
Exec vp-grp media dir, Carol Karasick
Assoc media dir, Charlie Greenberg
Asst media plnr, Abigail Fisher
Hispanic agency: Mendoza, Dillon & Associados, Inc. CA
Vp acct svces, Robert L. Howells

The Top 200 index is on page 50.

91. DE BEERS DIAMONDS

De Beers Con. Mines

	Media investments 1986	1985
Magazines	$16,842,500	$13,928,000
Natl. Sun. mags.	41,900	69,000
Network tv	9,686,600	9,579,000
Spot tv	486,600	460,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	15,700	32,000
Newspapers	—	—
Total	**$27,073,300**	**$24,068,000**

Marketing/brand management:
Dir, consumer adv div, Jeremy Pudney
Reg mgr-Americas, Peter Maddick
Mkt cntlrs, Stephen Lussier, Steven Swift
Agency: NW Ayer, New York
Exec vp-exec acct dir, George H. Eversman
Sr vp-mgmt supr, Judy Laughren
Acct supr, Marc Capra
Vp-grp media dir, David Lehmkuhl
Assoc media dir, Jean Connolly
Media supr, Hugh Meenan

92. M&M'S CANDIES

Mars Inc.

	Media investments	
	1986	1985
Magazines	$ 1,417,200	—
Natl. Sun. mags.	—	—
Network tv	13,804,100	$ 17,368,000
Spot radio*	12,012	449
Spot tv	6,109,900	2,399,000
Network radio	1,923,400	867,000
Outdoor	23,000	—
Cable network	3,486,700	3,252,000
Newspapers*	18,645	37,000
Total	**$26,794,957**	**$23,923,449**

*M&MD estimates

Marketing/brand management:
Pres, Howard Walker
Sr vp mktg & sls, J. Langdon
Agency: Ted Bates, N.Y.
Sr vp-mgmt rep, Alice Uniman
Sr vp-media dir, Barry Kaplan
Acct supr, George Ford
Acct exec, Isabel Albanese

93. CHEVROLET NOVA

Chevrolet Motors Division

	Media investments	
	1986	1985
Magazines	$ 2,691,300	$1,066,200
Natl. Sun. mags.	2,047,800	—
Network tv	11,594,900	2,747,800
Spot tv	6,408,900	4,885,700
Network radio	814,500	111,800
Spot radio	—	—
Outdoor	380,900	384,100
Network cable	279,000	36,500
Newspapers	2,279,829	816,435
Total	**$26,497,129**	**$10,048,535**

Marketing/brand management:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starren mktg mgr, Thomas A. Staudt
Fld mktg mgr, Edd K. Roggenkamp III
Asst gen sls mgr, Michael H. Erdman
Mktg mgr-passenger cars, Thomas R. Mason
Mgr passenger cars adv, Dannielle K. Colliver
Parent: General Motors Corp.
Agency: Campbell-Ewald, Detroit
Exec vp-client srvc dir, Robert H. Schirmer
Grp sr vp-grp mgmt suprs: Donald D. Williams (cars), Anthony J. Hopp (area mktg)
Sr vp-acct suprs: James F. Else, Milton J. Sandling Jr.
Vp-acct supr, Michael J. Ryan
Exec vp-media dir, Louis M. Schultz
Sr vp-assoc media dirs: James T. Birchfield (natl); Ronald D. Geskey (area mktg)
Sr vp-mgr, Karen Ritchie
Sr vp-dir natl brdcst media, Judith E. Sawyer
Sr vp-mgr lcl mkt media, Robert I. Mitchell II
Vp-media suprs (area mktg): Ellis J. Veech, John A. Winkelseth

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CANDY

Life can be so sweet when you're reaching the right audience. And for candy advertisers, both Simmons* and MRI* say Woman's World's women readers have a bigger sweet tooth han the Seven Sisters. We also have the greatest percent composition of ice cream, jam and jelly, and powdered soft drink users. For more delicious numbers, call us at 212-953-3344.

*1986 SMRB, Fall 1986 MRI

Woman's World THE WOMAN'S WEEKLY

Unique every week

94. BUICK DEALERS ASSOCIATION FRANCHISE

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$20,187,000	$17,649,000
Network radio	74,500	2,000
Spot radio	1,111,151	1,233,359
Outdoor	34,500	462,000
Network cable	—	—
Newspapers	4,997,802	4,955,000
Total	**$26,404,953**	**$24,301,359**

Marketing/brand management:
Buick Motor Div., General Motors:
Vp-gm, E.H. Mertz
Gen sls & srvc mgr, W. J. Atkinson
Gen mkt mgr, D.E. Clark
Dir adv, J.W. Qualman
Parent: General Motors Corp. Dealers Association
Agency: McCann-Erickson, Detroit
Exec vp, Gerald C. Atkin
Sr vp-mgmt rep supr, Jan Starr
Vp-grp acct suprs: Richard Hill, Glynn Armitage
Sr vp-media dir, W. Brien Schweikart

95. FEDERAL EXPRESS AIR CARGO

Federal Express Corp.

	Media investments	
	1986	1985
Magazines	$ 2,978,000	$ 1,907,000
Natl. Sun. mags.	—	—
Network tv	13,678,700	16,605,000
Spot tv	8,842,700	6,428,000
Network radio	—	—
Spot radio	130,533	—
Outdoor	—	—
Network cable	283,800	173,000
Newspapers	331,601	3,258,000
Total	**$26,245,334**	**$28,371,000**

Marketing/brand management:
Sr vp-mktg, Carole A. Presley
Vp-Express mktg, T. Michael Glenn
Mging dir-srvc mktg, Gayle M. Christensen
Mging dir (Express products marketing), Richard M. Metzler
Corp adv mgr, Nancy L. Altenburg
Vp-interntl mktg, David Shoenfeld
Agency: Fallon McElligott, Minneapolis
Chmn, Pat Fallon
Pres, Steve Sjoblad
Acct mgr, Joe Culligan
Media dir, Jim Sandstrom
Media plnr, Pam Krause
Acct execs: Ann Nerland, Mike Buchner
Asst acct exec, Shelly Sippl
Asst media plnr, Susan Erickson
Mktg dir, Bill Donnelly

96. POLAROID SPECTRA SYSTEM

Polaroid Corp.

(Includes cameras & film)

	Media investments	
	1986	1985
Magazines	$ 5,556,200	—
Natl. Sun. mags.	60,900	—
Network tv	18,439,400	—
Spot tv	305,600	—
Network radio	—	—
Spot radio	180,933	—
Outdoor	18,000	—
Network cable	5,400	—
Newspapers*	1,603,659	—
Total	**$26,170,092**	—

*M&MD estimates

Marketing/brand management:
Dir N Amer adv, Gary Moss
Grp vp worldwide mktg, Joseph McLaughlin
Grp vp consumer photo, William O'Neill
Sr adv mgr, Grant Schneider
Adv mgr, Diane Coron
Vp N Amer mktg opers, Peter K. Eichorn
Div vp sls, Brian O'Connor
Agency: BBDO, New York
Exec vp sr mgmt dir, Gary De Paulo
Sr vp mgmt supr, Lonny Strum
Vp acct supr, Paul Jacobson
Acct exec, Liz Kelly
Exec vp media svces, Arnie Semsky
Sr vp media plng, Mike Drake
Sr vp natl tv buying, Steve Grubbs
Vp assoc media dir, Michael Bienstock
Vp media supr, John Barry
Media plnr, Elisa Romm

97. NOW FILTER 100's CIGARETTES

R.J. Reynolds Tobacco Co.

	Media investments	
	1986	1985
Magazines	$13,574,100	$13,642,000
Natl. Sun. mags.	5,182,900	4,066,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	118,000	—
Network cable	—	—
Newspapers	7,199,193	9,453,000
Total	**$26,074,193**	**$27,161,000**

Marketing/brand management:
Sr vp mktg, J. T. Winebrenner
Mktg dir, D. N. Iauco
Brand mgr, G. C. Pennell
Dir mktg srvcs, C. T. Baroody
Dir media, Dan Pearson
Grp mgr media admin, R. E. Neal
Parent: RJR Nabisco Inc.
Creative agency: Young & Rubicam, N.Y.
Sr vp grp dir, Jane Brite
Sr vp mgt supr, Mike Feldman
Vp acct supr, Mitchel Hershey
Acct exec, Randi Ireland

98. SPRITE SOFT DRINK

Coca-Cola Co.

	Media investments	
	1986	1985
Magazines	$ 113,400	$ 551,000
Natl. Sun. mags.	—	—
Network tv	15,484,300	12,160,000
Spot tv	8,404,800	8,887,000
Network radio	—	—
Spot radio	1,088,200	1,021,364
Outdoor	29,700	126,000
Network cable	459,300	303,000
Newspapers	128,722	217,000
Total	**$25,708,422**	**$23,265,364**

Marketing/brand management:
Vp mktg, John C. Reid
Grp mktg dir, Patrick Garner
Brand mgr, Michael French
Assoc brand mgr, Kay Abercrombie
Vp-media dir, William H. Lynn
Corp media mgr, Terri Buckland
Agency: Lowe Marschalk, N.Y.
Exec vp-grp dir, Eric Einhorn

Acct supr, Neal Wilkins
Acct exec, Susan Gold
Asst acct exec, Laura Gross
Sr vp media, Stephen M. Segal
Vp-assoc media dir, Christina O. Brodie
Media grp hd, Reg Ungberg
Media supr, Lisa Raduazzo
Sr media plnr, Pam Edelstein
Asst media plnr, Kerrianne Walsh
Black agency: Burrell Advertising
Sr vp-gm , William Sharp
Vp acct supr, Neva Richardson
Acct exec, Barbara Jackson
Vp media dir, Nick Howse
Media supr, Michelle Garner
Hispanic Agency: Castor Spanish International

Lee Nails' use of discounted tv time led to its debut at no. 22.

99. **HERTZ RENT-A-CAR SYSTEM**

Allegis Corp.

	Media investments 1986	1985
Magazines	$ 4,154,100	$4,570,300
Natl. Sun. mags.	52,700	55,700
Network tv	3,819,500	1,910,900
Spot tv	7,450,500	5,787,900
Network radio	—	—
Spot radio	2,315,909	
Outdoor	71,000	118,900
Network cable	6,000	41,900
Newspapers	7,812,744	8,214,975
Total	**$25,682,453**	**$20,700,575**

Marketing/brand management:
Exec vp & gm-rent-a-car division, Brian J. Kennedy
Div vp mktg, Tom Jans
Div vp-adv & mktg progs, Rob Nuechterlein
Agency: Scali, McCabe, Sloves, N.Y.
Exec vp, Murray Gaylord
Sr vp, Gary Verrill
Vp, Bo Overlock

100. **MARLBORO FILTER KINGS & 100's CIGARETTES (multi-product ads)**

Philip Morris Cos.

	Media investments 1986	1985
Magazines	$20,050,000	$ 3,173,900
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	33,500	24,400
Network cable	—	—
Newspapers*	5,475,378	12,756,846
Total	**$25,558,878**	**$15,955,146**

*M&MD estimates

Marketing/brand management:
Grp brand mgr, Richard Stirlin
Brand mgr, Nancy Brennan
Vp media, James L. Thompson Jr.
Agency: Leo Burnett, Chicago
Sr vp acct dir, Jim Oates
Vp acct dir, Peter Volz
Acct supr, Paul Driggs
Exec vp media svce div, Willard Hadlock
Vp media dir, Bob Houghtlin

101. **MAZDA B-2000 COMPACT TRUCKS**

Mazda Motors of America (Central), Inc.

	Media investments 1986	1985
Magazines	$ 6,704,800	$ 6,156,000
Natl. Sun. mags.	—	—
Network tv	15,595,200	11,410,000
Spot tv	1,895,800	963,000
Network radio	—	—
Spot radio	—	—
Outdoor	1,000	—
Network cable	503,100	646,000
Newspapers*	596,297	423,000
Total	**$25,296,197**	**$19,598,000**

*M&MD estimates

Marketing/brand management:
Sr vp-gm, R. E. Hayden
Vp mktg, Duane Bowen
Sr vp-gm (MMA-East), Jim Trado
Vp mktg svces, R. Parker
Parent: Itoh C & Co Ltd.

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DIALOGUE MARKETING 800

RUPPMAN MARKETING SERVICES, INC.

1909 E. Cornell, Peoria, Illinois 61614

Agency: Foote, Cone & Belding, Los Angeles
Sr vp-grp mgmt dir, Welton Mansfield
Media dir, Robert MacDonald (Santa Ana)

102. FORD PASSENGER CARS & TRUCKS
(Joint product ads)
Ford Motor Co.

	Media investments 1986	1985
Magazines	$ 71,400	$ 275,600
Natl. Sun. mags.	—	—
Network tv	16,308,000	5,132,400
Spot tv	8,466,700	3,498,900
Network radio	—	—
Spot radio	—	—
Outdoor	143,700	34,300
Network cable	117,600	70,300
Newspapers	—	—
Total	**$25,107,400**	**$9,011,500**

Marketing/brand management:
Ford Division:
Vp-gm, R.L. Rewey
Gen mktg mgr, R.H. Roberts
Adv mgr, John Vanderzee
Car ad mgr, R.J. Gillooly
Truck ad mgr, G.M. Frick
Dealer ad mgr, H.S. Wilson
Agency: J. Walter Thompson, Detroit
Exec vp-gm, Peter Schweitzer
Sr vp-acct dir, Chuck Balestrino
Sr vp-media dir, Tom Healey
Vp-grp media dir (cars & trucks), Paul Hunt
Vp-media dir (cars), Howard Spokes
Sr vp-bdcst supr, Ron Fredrick
Hispanic markets agency: Hispania/JWT, New York
Sr vp-gm, Alfredo Jarrin
Acct supr, Andrea Doren
Media dir, Carlos Cintron
Acct exec, Ivan Pichardo
Black agency: Burrell Advertising (Cars only)
Vp-mgmt supr, Don Coleman
Acct exec, Esther Terrell
Vp-media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

103. US SPRINT LONG DISTANCE LINES
US Sprint Communications Co.

	Media investments 1986	1985
Magazines	$ 355,700	$ 451,000
Natl. Sun. mags.	63,900	—
Network tv	4,218,000	—
Spot tv	15,026,100	42,212,000
Network radio	—	—
Spot radio	1,923,148	3,552,996
Outdoor	21,000	—
Network cable	—	—
Newspapers*	3,233,881	6,440,000
Total	**$24,841,729**	**$52,676,996**

*MM&D estimates

Marketing/brand management:
Sr vp mktg, Edward W. Carter
Dir prod mgmt, Amanda Weathersby
Dir adv & dir mktg, Jorge Rodriguez
Agency: JWT, San Francisco
Sr vp-acct dir, Lloyd Stein
Vp-mgmt suprs: Sherry Carniglia, Tina Meinig
Sr vp media dir, Charlotte Weissenberger
Assoc media dir, Al Adams

104. NUTRASWEET SWEETENER
G. D. Searle & Co.

	Media investments 1986	1985
Magazines	$ 2,203,700	$ 1,119,000
Natl. Sun. mags.	—	—
Network tv	22,010,800	26,174,000
Spot tv	155,600	703,000
Network radio	—	—
Spot radio	—	—
Outdoor	12,200	—
Network cable	270,100	262,000
Newspapers	55,115	—
Total	**$24,707,515**	**$28,258,000**

Marketing/brand management:
Vp mktg, William Wohlfeil
Dir mktg, Brenda Sussna
Parent: Monsanto Company
Agency: Ogilvy & Mather, Chicago
Sr vp grp dir, Ian Miller
Vp mgt supr, Barbara Elmendorf
Hispanic Agency: Mendoza, Dillon & Associados, Inc. Newport Beach, Calif.
Vp acct svces, Eduardo Del Rivero

105. AUDI PASSENGER CARS
Volkswagenwerk AG

	Media investments 1986	1985
Magazines	$ 1,362,100	$ 1,709,600
Natl. Sun. mags.	43,300	61,400
Network tv	12,162,300	373,000
Spot tv	8,374,400	141,100
Network radio	—	—
Spot Radio	—	—
Outdoor	—	—
Network cable	135,700	—
Newspapers	2,554,924	1,510,835
Total	**$24,632,724**	**$3,795,935**

Marketing/brand management:
Vp, John Damoose
Dir mktg, Tony Kirton
Adv mgrs: Bruce Butzier, Jay Houghton, Russell Hill
Agency: DDB/Needham Worldwide, Detroit
Pres, Brian Bowler
Sr vp-mgmt supr, Peter Farago
Vp-acct supr, Tim Byer
Sr vp-media dir, Bob Mancini
Mgr-Audi plng, Kevin Brown

106. GOODWRENCH AUTOMOTIVE PARTS & SERVICES
General Motors Corp.

	Media investments 1986	1985
Magazines	$ 9,921,600	—
Natl. Sun. mags.	505,600	—
Network tv	11,600,100	—
Spot tv	289,300	—
Network radio	1,136,200	—
Spot radio	—	—
Outdoor	500	—
Network cable	29,700	—
Newspapers	(No data)	(No data)
Total	**$24,483,000**	—

Marketing/brand management:
Dir mktg-srvc parts operations, C.S. Wagner
Adv mgr-GM dealers group, K.F. Robinson
Agency: DMB&B, Bloomfield Hills, Mich.
Grp media dir, M. Choinski
Assoc media supr, S. Daniel
Vp-mgmt supr, T.T. Teegarden
VP-grp acct supr, C.S. Brandt
Acct supr, S.T. Hayes
Acct execs: C.A. Morgan, S.M. Doyle, B.E. Resnicoff

107. FORD RANGER COMPACT TRUCKS

Ford Motor Co.

	Media investments	
	1986	1985
Magazines	$ 5,281,200	$ 5,037,000
Natl. Sun. mags.	—	—
Network tv	12,360,900	12,613,000
Spot tv	6,323,800	1,012,000
Network radio	—	—
Spot radio	—	—
Outdoor	238,000	254,000
Network cable	204,600	293,000
Newspapers	—	—
Total	**$24,408,500**	**$19,209,000**

Marketing/brand management:
Ford Division:
Vp-gm, R.L. Rewey
Gen mktg mgr, R.H. Roberts
Adv mgr, John Vanderze[illegible]
Truck ad mgr, G.M. Frick
Agency: J. Walter Thompson, Detroit, MI
Exec vp-gm, Peter Schweitzer
Sr vp-acct dir, Chuck Balestrino
Sr vp-creat dir, Richard Howting
Sr vp-dir mktg srvcs, Robert Gamble
Sr vp-bdcst supr, Ron Fredrick
Sr vp-media dir, Thomas E. Healey
Vp-car & truck grp media dir, Paul Hunt
Assoc media dir (trucks), Susan Kiltie
Hispanic markets agency: Hispania/JWT, N.Y.
Sr vp-gm, Alfredo Jarrin
Acct supr, Andrea Doren
Media dir, Carlos Cintron
Acct exec, Ivan Pichardo

108. AMERICAN FAMILY MAIL-ORDER PROMOTIONS

National Syndications, Inc.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	$24,405,900	$28,735,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	—	—
Newspapers	—	42,000
Total	**$24,405,990**	**$28,777,000**

Marketing/brand management:
Vp mktg, Jess Joseph
Pres, Bud Pironti
Parent: National Paragon
Agency: In-house
Media coor, Jess Joseph

109. TIME-LIFE BOOKS

Time, Inc.

	Media investments	
	1986	1985
Magazines	$13,968,800	$15,377,000
Natl. Sun. mags.	185,100	163,000
Network tv	34,800	9,000
Spot tv	5,970,100	3,374,000
Network radio	—	—
Spot radio	47,721	8,668
Outdoor	—	—
Network cable	3,938,800	1,955,000
Newspapers	234,192	89,000
Total	**$24,379,513**	**$20,975,668**

Marketing/brand management:
Pres Time-Life Books, Chris Linen
Sr vp mktg, Leo Toraballa
Vp media svces, Hallett Johnson III
Dirs prod mgmt: Tamara Kirson, Roger Miller
Brand mgrs: Mary Donohoe, Yuri Okuda, Kathy Bloomfield, Kathryn McDonald
Adv media mgr, Nancy Jones
Bdcst media mgr, Wayne Butler
Print media mgr, Carla Harding
Agencies: Wunderman, Ricotta & Kline, N.Y.
Vp mgmt supr, Judy Keane
Exec vp media dir, Polly Langbort
Vp assoc media dir, Jane Plant
Grp dir exec vp, Worth Linen
Media supr, Cathy Calve
Acct execs: Hanna Schwartz, Wendy Ball
A. Eicoff & Co.
Pres, Ron Bliwas
Sr vp acct mgr, Rick Sangerman
Sr vp media dir, Francie Barson
Sr vp crtv dir, Joel Rappin
Vp grp crtv dir, Carol Darr
Media supr, Beth Constantine
Acct exec, Laura Ebbers
Trfc & contract mgr, Dena Gordon
Media buyers: Ken Hodack, Peggie Stuebe, Rick Shreuder
Direct Inc.
Pres, John Verdon
Dir acct mgmt, Steve Walters
Assoc media dirs: Brian Hughes, Brian Gillian
Crtv dir, Spencer Lambert
Media plnr, Sean Cunningham
Asst plnr, Susan Michalski
Acct exec, Gail Brown
Acct supr, Frank Salerno

110. LOWENBRAU BEER

Miller Brewing Co.

	Media investments	
	1986	1985
Magazines	$ 2,418,100	$ 594,000
Natl. Sun. mags.	—	—
Network tv	7,583,300	9,050,000
Spot tv	8,668,900	7,192,000
Network radio	—	—
Spot radio	4,597,634	3,205,150
Outdoor	266,800	8,000
Network cable	554,600	345,000
Newspapers	243,819	167,000
Total	**$24,333,153**	**$20,561,150**

Marketing/brand management:
Pres, William K. Howell
Vp brand mgmt, Robert A. Toledo
Grp prod dir, William H. Barrett
Brand mgr, Tamara J. Hauck
Asst brand mgr, Robb DeGraff
Parent company: Philip Morris
Agency: J. Walter Thompson, Chicago
Sr vp-acct dir, Will Howard
Acct supr, Dermid Eagen
Acct rep, Neal Yonover
Acct coor, Melissa Sturgeon
Hispanic agency: Mendoza, Dillon & Associados, Inc. Newport Beach, Calif.
Vp acct svces, Eduardo Del Rivero

111. MARLBORO FILTERS

Philip Morris U.S.A.

	Media investments	
	1986	1985
Magazines	$ 2,805,800	$ 4,217,000
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	15,928,100	19,329,000
Network cable	—	—
Newspapers	5,475.378	4,324,000
Total	**$24,209,278**	**$27,870,000**

Marketing/brand management:
Grp brand mgr, Richard Stirlin
(continued)

Brand mgr, Nancy Brennan
Vp media, James L. Thompson Jr.
Agency: Leo Burnett, Chicago
Sr vp-acct dir, Jim Oates
Vp-acct dir, Peter Volz
Acct supr, Paul Driggs
Exec vp media srvcs div, Willard Hadlock
Vp-media dir, Bob Houghtlin

American Express, MasterCard, Discover and Visa cards all appear in the Top 200.

112. GTE CORPORATE

GTE Corp.

	Media investments 1986	1985
Magazines	$ 4,464,700	$ 5,686,000
Natl. Sun. mags.	77,700	—
Network tv	8,230,800	8,041,000
Spot tv	8,102,400	3,061,000
Network radio	—	—
Spot radio	1,966,372	2,128,288
Outdoor	—	—
Network cable	43,400	169,000
Newspapers*	8,168,695	6,942,000
Total	**$23,919,000**	**$21,775,000**

*M&MD estimates

Marketing/brand management:
Vp-corp comm, Edward C. MacEwen
Dir corp adv, Rupert Smith
Agency: DDB/Needham Worldwide, New York
Exec vp, Larry Iannuzzelli
Grp sr vp, Denis Crosley
Vp-acct suprs: Joe Belle Isle, Jim Cole, Susan Hershey, Richard Van Winkle
Vp-mgmt supr, Nancy Bretl
Acct supr, Ann Davies
Acct execs: Ray Albergotti, Helen Wanamaker, Debbie Vanderbeek, Karin Muff, Scott McNulty
Vp-media plng dir, Bob Huff
Vp-assoc media plng dir, Davis Stewart

113. MARLBORO LIGHTS KINGS & 100'S CIGARETTES

Philip Morris Companies, Inc.

	Media investments 1986	1985
Magazines	$ 20,250,100	$ 8,212,200
Natl. Sun. mags.	—	2,183,800
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	404,800	166,500
Network cable	—	—
Newspapers	3,177,611	14,819,911
Total	**$23,832,511**	**$25,382,411**

Marketing/brand management:
Grp brand mgr, Richard Stirlin
Brand mgr, Nancy Brennan
Vp media, James L. Thompson Jr.
Agency: Leo Burnett, Chicago
Sr vp acct dir, Jim Oates
Vp acct dir, Peter Volz
Acct supr, Paul Driggs
Exec vp media svce dir, Willard Hadlock
Vp media dir, Bob Houghtlin

114. HOME BOX OFFICE PAY TV CHANNEL

Time Inc.

	Media investments 1986	1985
Magazines	$ 8,371,200	$ 2,473,700
Natl. Sun. mags.	35,800	—
Network tv	—	9,600
Spot tv	7,526,300	6,726,500
Network radio	—	—
Spot radio	2,891,846	3,485,362
Outdoor	10,000	6,000
Network cable	144,200	481,300
Newspapers	4,723,907	4,021,724
Total	**$23,703,253**	**$17,204,186**

Marketing/brand management:
Sr vp-mktg, John Billick
Vp-adv & prom, Dan Levinson
Vp-dir mktg, Steve Janus
Agency: BBDO, N.Y.
Exec vp, Joe Barrett
Sr vp, Ken Angel
Vp, John Marchese
Sr vp, Leslie Margulis
Exec vp, Charles Miesmer
Assoc crtv dir, Mike Shevack

115. CHEESE INDUSTRY PROMOTION

American Dairy Association

	Media investments 1986	1985
Magazines	$ 1,466,000	$ 233,000
Natl. Sun. mags.	—	—
Network tv	19,691,700	$31,095,000
Spot tv	853,400	1,581,000
Network radio	739,100	640,000
Spot radio	47,830	82,461
Outdoor	8,600	3,000
Network cable	630,400	402,000
Newspapers*	122,975	69,000
Total	**$23,560,005**	**$34,105,461**

*M&MD estimates

Marketing/brand management:
Sr vp- adv & mktg srvcs, United Dairy Industry Association, and pres, American Dairy Association, Joseph B. Kelsch
Vp-mktg plng, Stephen A. Dohrmann
Vp-mktg srvcs, Grover B. Simpson
Dir adv srvcs, Donna A. Arcus
Mktg mgr, manufactured prods, Amy J. Truitt
Agency: D'Arcy Masius Benton & Bowles, Chicago
Sr vp-mgmt supr, Ben Bishop
Vp-acct grp suprs: Bob Meuser, Dave Urbaniak, Mike Leonhart
Acct suprs, Brad English, Andrea Dichter
Sr vp-dir media srvcs, Joe Zeller
Vp-assoc media dir, Willard Hemsworth

116. AMTRAK RAIL SYSTEM

National Railroad Passenger Corp.

	Media investments 1986	1985
Magazines	$ 2,042,000	$ 3,660,000
Natl. Sun. mags.	2,591,600	2,033,000
Network tv	980,800	704,000
Spot tv	12,637,500	8,070,000
Network radio	—	—
Spot radio	1,126,287	—
Outdoor	322,500	1,084,000
Network cable	31,900	—
Newspapers	3,800,000	6,756,000
Total	**$23,532,587**	**$22,307,000**

(continued)

Marketing/brand management:
Exec vp mktg & bus dev, William Norman
Vp sls & adv, Robert Gall
Dir adv & sls prom, William Castleberry
Agency: DDB Needham, N.Y.
Sr vp-mgmt suprs, Roy Lancaster, Dick Murray
Vp-grp media dir, Robert Huff
Vp, acct supr, Lauren Berger
Acct execs, Margaret Lynch, Elizabeth Whall, Barry Brown, John Collins

> **The U.S. Mint made the list, thanks to the Statue of Liberty coins.**

117. BLUE CROSS & BLUE SHIELD PLANS

Blue Cross and Blue Shield Association

(Not including ads from regional operations and ads solely for Blue Cross Insurance, etc.)

	Media investments	
	1986	1985
Magazines	$ 1,074,300	$ 1,809,000
Natl. Sun. mags.	56,600	—
Network tv	4,952,200	4,530,000
Spot tv	15,343,000	9,759,000
Network radio	—	1,265,000
Spot radio	1,419,720	104,532
Outdoor	555,500	200,000
Network cable	9,000	—
Newspapers	—	—
Total	**$23,410,320**	**$17,667,532**

Marketing/brand management:
Sr vp-natl mktg div, Leonard E. Wood III
Exec dirs: Richard Maturi, Rick Enright
Vp comm, Duane Carlson
Sr consultant, Tom Mora
Corp plnr, Gere Collosky
Agency: HCM, Chicago
Sr vp, Laurel Baer
Acct exec, Bob Reilley
Acct supr, Dan Schmidt

118. WINN-DIXIE STORES

Winn-Dixie Stores, Inc.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 5,097,900	$ 2,199,000
Spot tv	16,874,200	$17,330,000
Network radio	—	—
Spot radio	833,558	993,460
Outdoor	523,100	50,000
Network cable	—	86,000
Newspapers	(No data)	(No data)
Total	**$23,328,758**	**$20,658,460**

Marketing-brand management:
Dir adv, G. E. Clerc, Jr.
Agency: William Cook Advertising Inc., Jacksonville, FL
Exec vp-acct mgr, Carson Eddings
Vp-acct suprs: Lura Benton, James Radcliffe, Mike Russell
Acct execs: Dick Mathews, Marty Lynch, Dick Bentz
Media dir, Mary Shine
Media plnr, Bob Stone

119. PAMPERS DISPOSABLE DIAPERS

The Procter & Gamble Co.

	Media investments	
	1986	1985
Magazines	$ 610,300	$ 560,000
Natl. Sun. mags.	—	—
Network tv	19,020,000	6,425,000
Spot tv	3,208,700	10,390,000
Network radio	—	—
Spot radio	—	33,508
Outdoor	3,900	—
Network cable	350,400	—
Newspapers	117,864	878,000
Total	**$23,311,164**	**$18,286,508**

Marketing/brand management:
Vp div mgr, Richard R. Nicolosi
Agency: D'Arcy Masius Benton & Bowles, New York
Sr vp grp dir, Ed Lebar
Sr vp media dir, Rich Hamilton
Vp assoc media dir, Mark McLaughlin

120. WRIGLEY'S DOUBLEMINT GUM

Wm. Wrigley Jr Co

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	13,205,700	8,686,400
Spot tv	6,448,600	4,777,100
Network radio	2,087,700	1,273,900
Spot radio*	—	2,855
Outdoor	—	—
Network cable	1,565,300	720,100
Newspapers	—	—
Total	**$23,307,300**	**$15,460,355**

*M&MD estimates

Marketing/brand management:
Exec vp mktg, Ronald O. Cox
Mktg dir, Gary Bebee
Mktg mgr, Ron Boyum
Agency: BBDO, Chicago
Exec vp, Andrew Donchak
Vp acct supr, Tonise Hayden
Sr acct exec, Kathi Hudson
Sr vp media dir, Robert Garrison
Vp dir of plng, Kathy Segal
Vp AMD, Nancy Swiet

121. WRIGLEY'S SPEARMINT GUM

Wm. Wrigley, Jr. Co.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$14,965,400	$14,619,000
Spot tv	6,353,000	5,531,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	1,813,400	1,343,000
Newspapers	—	—
Total	**$23,131,800**	**$21,493,000**

Marketing/brand management:
Exec vp mktg, Ronald O. Cox
Mktg dir, Gary Bebee
Mktg mgr, Ron Boyum
Agency: BBDO Chicago
Exec vp, Andrew Donchak
Vp-acct supr, Jay Tolman
Acct exec, Mike Schneider
Sr vp-media dir, Robert Garrison
Vp dir plng, Kathy Segal
Vp AMD, Deb Nevin

122. SAFEWAY STORES

Safeway Stores, Inc.

	Media investments	
	1986	1985
Magazines	$ 1,067,100	$ 1,273,000
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	20,144,900	18,316,000
Network radio	—	—
Spot radio	1,444,539	—
Outdoor	191,100	513,000
Network cable	—	—
Newspapers	(No data)	(No data)
Total	**$22,847,639**	**$20,102,000**

Marketing/brand management:
Grp vp-dir mktg, Donald J. Smith
Vp adv & prom, Ron Giglio
Agency: Ketchum Communications, San Francisco
Sr vp-grp dir, Dianne Snedaker
Vp-acct supr, Carla Emil
Acct supr, Zonda Montgomery
Sr vp-media dir, Cheryl Kroyer
Vp-assoc media dir, Ricki Kohn
Media supr, Lynn Wolfson
Pres-exec crtv dir, Ken Dudwick
Sr vp-crtv dir, Larry Kopald
Vp assoc crtv dirs: Carla Krummel, Dave Tyree
Rsrch supr, Jeanne Brown
Vp dir bdcst prdctn, Debora January
Advertising managers of 13 regional divisions determine media expenditures. Each division employs its own broadcast agency.

123. WISK DETERGENT

Lever Brothers Co.

	Media investments	
	1986	1985
Magazines	$1,487,900	—
Natl. Sun. mags.	—	—
Network tv	15,978,200	$10,371,000
Spot tv	5,182,300	6,398,000
Network radio	—	223,000
Spot radio	12,055	244,014
Outdoor	—	—
Network cable	122,900	101,000
Newspapers	3,706	—
Total	**$22,787,061**	**$17,337,014**

Marketing/brand management:
Vp mktg household prod, John Speirs
Mktg mgr, George Mayer
Parent: Unilever United States Inc.
Agency: BBDO, New York
Exec vp-sr mgmt rep, Art Unger
Sr vp-mgmt supr, William Heath
Vp-acct supr, Don Maurer
Sr vp dir media plng, Mike Drake
Vp-assoc media dir, Nora Gallick
Media supr, Stella Sznajderman
Media plnrs: Pam Baron, Lori Greenberg

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Success

THE BUFFALO NEWS

ON THE GO!

124. GOODYEAR CAR TIRES

The Goodyear Tire & Rubber Co.

	Media investments 1986	1985
Magazines	$ 8,168,800	$10,452,000
Natl. Sun. mags.	53,200	—
Network tv	9,929,600	8,614,000
Spot tv	3,744,600	1,813,000
Network radio	—	—
Spot radio	402,991	292,195
Outdoor	17,700	—
Network cable	440,200	352,000
Newspapers	—	—
Total	**$22,757,091**	**$21,523,195**

Marketing/brand management:
Vp adv, James K. Devoe
Dir prod adv, Robert L. Gray
Dir rtl adv, Davis M. Jones
Mgr adv-auto tires, J.A. Neawedde
Mgr adv-truck & farm tires, Norb Drol
Adv mgr-perf, RV, racing tires & ARP, P.F. Suloff
Mgr adv-gen prods, J.T. Manning
Adv mgr-retail stores, J.R. Pascover
Mgr-major mkt progs, G.S. Drop

Agency: J. Walter Thompson, New York
Sr vp-mgmt dir, Peter Hanley
Vp-sr acct supr, Howard Pickett
Vp-acct supr, Bob Losi
Acct rep, Kate Lynch
Exec vp-U.S. dir media srvcs, Richard Kostyra
Sr vp-dir media plng, John Gray
Sr vp-dir bdcst, John Sisk
Vp-assoc media dir (plng), Al Romano
Vp-assoc media dir (net neg), Ron Von Urff
Media supr, Mark Stewart
Media plnr, Lisa Bannerot
Asst media plnr, Jim Brubaker
International agency: McCann-Erickson, New York
Sr vp-worldwide acct dir, Peter Kennaby

125. MAZDA DEALERS ASSOCIATION FRANCHISE

Mazda Motors of America (Central), Inc.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$22,313,300	$12,042,900
Network radio	—	—
Spot radio*	6,817	13,478
Outdoor	—	—
Network cable	—	—
Newspapers	345,531	397,430
Total	**$22,665,648**	**$12,453,808**

*M&MD estimates

Marketing/brand management:
Sr vp-gm, R. E. Hayden
Grp vp sls, R. Colliver
Vp mktg, Duane Bowen
Vp mktg svces, R. Parker

UP & COMING!

In the affluent Daily News market of Los Angeles, Daily News circulation growth continues to outpace its chief competitor year after year. In fact, over the past seven years, Daily News circulation has increased more than 43,000 as compared to only 3,700 for the Los Angeles Times. *

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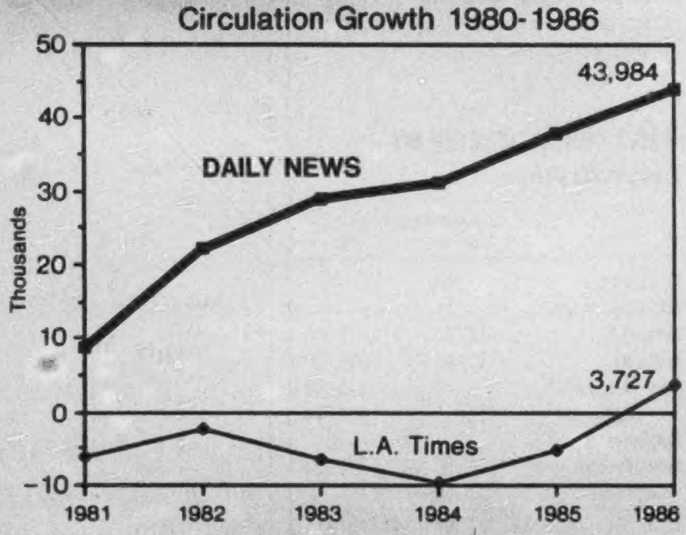


Circulation Growth 1980-1986

* Number represents circulation growth in Daily News market only (in northern Los Angeles and southern Ventura counties). Daily News total circulation is 153,000 daily, 166,000 Sunday. Source VAC Reports 1980; ABC Audit Reports 1981-1986.

Daily News
LOS ANGELES

Represented nationally by Sawyer-Ferguson-Walker, Inc.

Sr vp-gm (MMA-East), Jim Trado
Vp mktg & sls, J. Wiesner
Vp regional oper, G. McCabe
Agency: Foote, Cone & Belding, Santa Ana
Sr vp-grp mgmt dir, Welton Mansfield
Vp media dir, Robert MacDonald

AT&T has six separate entries, including corporate ad spending, in this year's report.

126. CHEVROLET COMPACT TRUCKS

Chevrolet Motors Division

	Media investments	
	1986	1985
Magazines	2,716,700	884,000
Natl. Sun. mags.	589,800	—
Network tv	$13,226,700	$ 2,585,000
Spot tv	1,734,200	700,100
Network radio	458,000	—
Spot radio	1,555,187	68,540
Outdoor	100	—
Network cable	192,600	77,800
Newspapers	2,068,932	2,276,505
Total	**$22,542,219**	**$6,591,945**

Marketing/brand management:
GM, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Fld mktg mgr, Edd K. Roggenkamp III
Asst gen sls mgr, Michael H. Erdman
Mktg mgr-trucks, John M. Kelley
Mgr truck adv, Thomas P. Cutler
Parent: General Motors Corp.
Agency: Campbell-Ewald, Detroit
Exec vp-client srvc dir, Robert H. Schirmer
Sr vp, Dennis G. Connaughton
Grp sr vp-grp mgmt suprs: John A. Barczyk (trucks), Anthony J. Hopp (area mktg)
Exec vp-media srvcs dir, Louis M. Schultz
Sr vp-assoc media dirs: James T. Birchfield (natl), Ronald D. Geskey (area mktg)
Sr vp-mgr, Barbara A. Munro
Sr vp-dir natl brdcst media, Judith E. Sawyer
Sr vp-mgr lcl mkt media, Robert I. Mitchell II
Vp-media suprs (area mktg): Ellis J. Veech, John A. Winkelseth

127. WINSTON CIGARETTES

R. J. Reynolds Tobacco Co.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	$21,009,000	$25,510,000
Network cable	—	—
Newspapers	1,517,901	6,458,000
Total	**$22,526,901**	**$31,968,000**

Marketing/brand management:
Sr vp brand mktg, J. T. Winebrenner
Mktg dir, R.M. Sanders
Sr brand mgr, T. C. Harris
Dir media, Dan Pearson
Grp mgr media admin, R. E. Neal
Grp plng mgr, T. J. McCabe
Parent: RJR Nabisco, Inc.
Creative agency: McCann-Erickson, N.Y.
Exec vp, Edward G. A. Bathon
Sr vp-mgmt rep, Simon Marlow

128. MCI CONSUMER LONG DISTANCE

MCI Communications Corp.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 12,539,400	—
Spot tv	8,247,300	$ 25,665,000
Network radio	—	—
Spot radio*	564,461	97,148
Outdoor	—	—
Network cable	1,000	—
Newspapers*	1,158,118	1,145,000
Total	**$22,510,279**	**$26,907,148**

*M&MD estimates

Marketing/brand management:
Sr vp corp affairs, Howard Crane
Vp adv, Judy Ranzer
Vp prod mktg, Roy Gamse
Agency: D'Arcy Masius Benton & Bowles Inc., N.Y.
Sr vp/grp dir, Mike Moore
Vp acct dir, Lamar LeMonte
Sr vp media dir, Rich Hamilton
Media dir, Doug MacMullan

129. U.S. MINT COINS

United States Government

	Media investments	
	1986	1985
Magazines	$ 3,181,700	$ 215,200
Natl. Sun. mags.	395,300	—
Network tv	16,898,200	—
Spot tv	1,876,500	—
Network radio	—	—
Outdoor	—	—
Network cable	10,000	—
Newspapers	269,928	82,528
Total	**$22,361,628**	**$297,728**

Marketing/brand management:
Bureau of the mint:
Dir U.S. Mint, Donna Poppe
Dir adv, Brian O'Donnell
Agency: Undecided

130. ECKERD DRUG STORES

Jack Eckerd Corp.

	Media investments	
	1986	1985
Magazines	$ 545,000	$ 206,200
Natl. Sun. mags.	—	—
Network tv	1,279,600	1,888,900
Spot tv	17,379,000	13,159,400
Network radio	—	—
Spot radio	938,999	129,229
Outdoor	44,600	7,700
Network cable	2,022,900	1,011,700
Newspapers	(No data)	(No data)
Total	**$22,210,099**	**$16,403,129**

Marketing/brand management:
Exec vp-mktg, Ronald D. Peterson
Vp-ad/sls prom, Kenneth Banks
Agency: WB Doner, St. Petersburg, Fla.
Sr vp-grp dir, Ann Bergstrom
Vp, acct supr, Craig Carpenter
Acct execs: Shelley Manes, Jenny Puryear
Vp-media dir, Robert G. Jorden
Assoc media dir, Joan Morse

131. CALIFORNIA COOLER

Brown-Forman Corp.

	Media investments 1986	Media investments 1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$16,137,300	$ 5,633,600
Spot tv	2,538,200	5,381,500
Network radio	—	258,500
Spot radio	2,599,527	5,851,808
Outdoor	415,000	70,900
Network cable	506,100	346,700
Newspapers	—	16,521
Total	**$22,196,127**	**$17,559,529**

Marketing/brand management:
Vp-mktg, Jon Shastid
Sr brand mgr, Mimi Zinniel
Parent: Brown-Forman Corp.
Agency: Chiat/Day, San Francisco
Vp-dir acct mgmt, Matthew Crisci
Mgmt supr, Wayne Fulcher
Acct supr, Michael Murphy
Acct execs: Janice de Ryss, Jamie Goodman
Vp-media dir, Camille L. Johnson
Assoc media dir, Catharine Gerber
Net supr, Dan Ciccone
Media supr, Debbie Kelly
Black agency: Burrell Advertising
Vp-mgmt supr, Robert Hinton
Acct exec, Esther Terrell
Vp-media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

132. SUBARU DEALERS ASSOCIATION

Subaru of America, Inc.

	Media investments 1986	Media investments 1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$18,630,100	$13,084,500
Network radio	—	—
Spot radio*	2,604,594	726,652
Outdoor	—	9,300
Network cable	—	—
Newspapers	927,341	477,234
Total	**$22,162,035**	**$14,297,686**

*M&MD estimates

Marketing/brand management:
Grp vp sls mktg, C.D. "Doug" Mahin
Vp mktg, David L. Sippel
Dir adv & merch, Chris Wackman
Natl adv ops mgr, Joe Fellona
Natl dist mktg mgr, Jeff Lawson
Parent: Fuji Heavy Industries
Agency: Levine, Huntley, Schmidt & Beaver, Inc. N.Y.
Suburu distributer acct group:
Vp acct sup, Jack O'Hollaren
Acct supr, Scott Marticke
Asst acct execs: Jeff Petre, Elaine Romano, John Kennedy
Field acct execs:
Sr acct execs: Dan Kaufman (S.E. Subaru), Michael Ervin (Subaru Intl), Steve Faris (S.W. Subaru)
Acct execs: Gordon Daly (Sub Atlantic), Cynthia Greene (Sub dist corp), Vince Agul (Sub of S. Calif), Phil Johnson (Sub of N. Calif.)
Steve Harper (Great Lakes Sub)
National acct group:
Sr vp grp dir, natl & dist bus, Terry Bonaccolta
Vp acct supr, Michael Elkisch
Sr acct execs: Jerry Noonan, Bernie Lanigan
Asst acct exec, Cheri Stern

133. HALLMARK CARDS

Hallmark Cards, Inc.

(Not including corporate ads, stuffed toys, etc.)

	Media investments 1986	Media investments 1985
Magazines	363,800	—
Natl. Sun. mags.	—	—
Network tv	$18,406,500	$16,578,000
Spot tv	1,372,700	227,000
Network radio	—	—
Spot radio	255,101	—
Outdoor	—	—
Network cable	—	—
Newspapers	1,470,194	493,000
Total	**$21,868,295**	**$17,298,000**

Marketing/brand management:
Grp vp-Hallmark brand, Tom Johnston
Vp-card prods, Homer Evans
Vp-specialty prods, Buddy Jones
Vp-adv & prom, Brad Moore
Dir comm, Nancy Matheny
Agency: Ogilvy & Mather, N.Y.
Sr vp-grp dir, Gene O'Sullivan
Vp-mgmt supr, Linda Cornelius
Vp-acct supr, Harold Sogard
Sr vp-assoc media dir, Ray Simko
Vp-asst media dir, Beth LeMasurier

134. CHRYSLER PASSENGER CARS

Chrysler Corp.

	Media investments 1986	Media investments 1985
Magazines	$ 805,600	$ 1,617,600
Natl. Sun. mags.	234,400	—
Network tv	10,456,300	5,933,200
Spot tv	3,923,600	3,326,800
Network radio	—	969,600
Spot radio	112,282	—
Outdoor	77,000	316,100
Network cable	272,100	451,800
Newspapers	5,979,689	5,022,624
Total	**$21,860,971**	**$17,637,724**

Marketing/brand management:
Vp-mktg, Joseph A. Campana
Mktg dir, Arthur C. "Bud" Liebler
Brand mgr, Michael O'Malley
Agency: Bozell, Jacobs, Kenyon & Eckhardt, Detroit
Exec vp-gm, George F. Beech
Sr vp-mgmt suprs: L. Vernon, J.P Hickey (dealer assn)
Sr vp-media dir, P.D. Matz
Sr vp-dir media plng, E.E. Kruger
Vp-corp media cont dir, S. Kulczycki
Acct execs: N. Sparrer, G. Burkhardt
Merchandising: Ross Roy, Detroit
Exec vp, Richard C. Ward
Sr vp, J.V. Vehko
Sr vp-gm (Ross Roy prods), R.J. Oliver
Vp-grp acct suprs: D.F. Baldwin, T.W. Kemper, M.P Webster, D.C. Scheich
Vp-acct suprs: G.T. Abdullah, C.L.Reid, R.B. Smith, R.H. West
Sr vp-media dir, G.N.M. Moody

135. CANON COPIERS

Canon U.S.A., Inc.

	Media investments 1986	Media investments 1985
Magazines	$ 5,404,500	$ 5,964,000
Natl. Sun. mags.	28,900	—
Network tv	14,165,600	15,307,000
Spot tv	900,300	527,000
Network radio	—	900,000
Spot Radio	—	—
Outdoor	14,100	44,000
Network cable	144,700	336,000
Newspapers	1,197,066	927,000
Total	**$21,855,166**	**$24,005,000**

Marketing/brand management:
Adv mgr, K. Kikuchi
Agency: DCA Advertising
Vp-dir media srvcs, Steven Naftelberg
Media grp supr, Jim Tyrrell
Media plnr, Brian Loftus
Asst media plnr, Miles Silverman
Vp-mgmt supr, Nick Nakahara
Acct supr, Mariko Kobayashi
Acct exec, Janet Virgil
Asst acct exec, Bob Mitchell
Acct coor, Satch Takayasu

136. HYUNDAI DEALERS ASSOCIATION FRANCHISE

Hyundai Motor America

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$21,606,100	—
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	—	—
Newspapers	188,777	—
Total	**$21,794,877**	**—**

Marketing/brand management:
Dir mktg, Jack Collins
Natl adv mgr, Joe Corey
Media dlr assoc mgr, Tom Meyers
Agency: Backer & Spielvogel
Sr vp-mgmt supr, Jim SanFilippo
Vp-acct dirs: Jim Cooper, Ron Rogginger, Larry Saunders

137. MATTEL DOLLS

Mattel, Inc.

	Media investments 1986	1985
Magazines	$ 740,100	$ 246,000
Natl. Sun. mags.	—	—
Network tv	14,498,700	15,597,000
Spot tv	5,628,500	5,566,000
Network radio	—	—
Spot radio*	321,027	—
Outdoor	—	—
Network cable	511,300	818,000
Newspapers*	—	77,000
Total	**$21,699,627**	**$22,304,000**

*M&MD estimates

Marketing/brand management:
Exec vp mktg Joseph F. Morrison
Vp mktg svces, John Weems
Dir adv svces, Denton Cruise
Agency: Ogilvy & Mather, L.A.
Exec vp & mng dir, Gerry McGee
Vp-mgmt supr, Freddie Bee
Sr vp-media dir, Ron Reilly
Vp-assoc media dir, Tom Coughlin

138. SUBARU PASSENGER CARS

Subaru of America, Inc.

	Media investments 1986	1985
Magazines	$3,285,700	$2,103,800
Natl. Sun. mags.	—	—
Network tv	10,844,700	7,271,000
Spot tv	6,633,200	4,590,500
Network radio	—	—
Spot radio	—	—
Outdoor	—	53,300
Network cable	464,700	204,600
Newspapers	470,199	752,280
Total	**$21,698,499**	**$14,975,480**

Marketing/brand management:
Grp vp sls mktg, C.D. "Doug" Mahin
Vp mktg, David L. Sippel
Dir adv & merch, Chris Wackman
Natl adv ops mgr, Joe Fellona
Natl dist mktg mgr, Jeff Lawson
Parent: Fuji Heavy Industries
Agency: Levine, Huntley, Schmidt & Beaver Inc. N.Y.
Sr vp grp dir (natl & dist bus), Terry Bonaccolta
Subaru national account group:
Vp acct supr, Michael Elkisch
Sr acct execs: Jerry Noonan, Bernie Lanigan
Asst. acct exec, Cheri Stern
Vp media, Michael Daly
Media dir, Jim Dragoumus

Subaru Distributor Account Group:
Vp acct supr, Jack O'Hollaren
Acct supr. Scott Marticke
Asst acct execs: Jeff Petre, Elaine Romano, John Kennedy

Field Account Executives:
Sr acct execs: Dan Kaufman (S.E.)
Michael Ervin (Sub int'l), Steve Faris (S.W)
Acct execs: Gordon Daly, Cynthia Greene, Vince Agul,
Phil Johnson, Steve Harper

139. KLEENEX HUGGIES DIAPERS

Kimberly-Clark Corp.

	Media investments 1986	1985
Magazines	$ 1,303,400	$ 1,454,000
Natl. Sun. mags.	—	—
Network tv	18,593,600	23,153,000
Spot tv	1,611,600	2,312,000
Network radio	—	—
Spot radio	—	154,423
Outdoor	—	—
Network cable	45,900	121,000
Newspapers	89,499	357,000
Total	**$21,643,999**	**$27,551,423**

Marketing/brand management:
Vp brand mgmt infant care div, Richard F. Auchter
Mktg dir, W. Dudley Lehman
Dir adv srvcs, George J. Ker, Jr.
Agency: Ogilvy & Mather, N.Y.
Sr vp-grp dir, Cliff Angers
Vp-mgmt supr, David Mechlin
Vp-assoc media dir, Mark Rice
Asst media dir, Sue Nanfeldt

140. STROH'S BEER

Stroh Brewery Co.

	Media investments 1986	1985
Magazines	—	$ 249,000
Natl. Sun. mags.	—	—
Network tv	13,404,800	$16,458,000
Spot tv	2,108,400	1,271,000
Network radio	1,075,100	—
Spot radio	3,715,324	3,632,834
Outdoor	377,700	932,000
Network cable	449,000	2,060,000
Newspapers	294,252	429,000
Total	**$21,424,576**	**$25,031,834**

Marketing/brand management:
Crtv svces dir, Michael C. Jaeger
Strategic plng dir, Charles Powell
Brand plng mgr, Mark Steinberg
Brand plnr, Kevin Singer
Corp media mgr, Peter Speek
Exec vp mktg & sls, J. Wayne Jones
Vp corp media, David Martin
Agency: Lowe Marschalk, N.Y.
Acct supr, Paul T. Norwich
Vp-assoc media dir, Chris Brodie
Media grp hd, Reg Ungberg
Media supr, William Moore
Sr media plnr, Kathy Katemopolous
Acct exec, Kevin Compagna

Black agency: Burrell, Chicago
Vp mgmt supr, Don Coleman
Vp acct dir, Jasper Tanner
Acct execs: Esther Terrell, Mark Lee
Vp media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

141. MATTEL TOYS

Mattel, Inc.

(Not including specific ads for Mattel games, dolls, etc.)

	Media investments 1986	Media investments 1985
Magazines	$ 1,717,900	$ 1,603,000
Natl. Sun. mags.	282,100	—
Network tv	8,649,000	13,930,000
Spot tv	9,113,400	11,906,000
Network radio	—	—
Spot radio*	321,027	—
Outdoor	—	—
Network cable	884,300	1,079,000
Newspapers*	449,255	77,000
Total	**$21,416,982**	**$28,595,000**

*M&MD estimates

Marketing/brand management:
Exec vp mktg, Joseph F. Morrison
Vp mktg svces, John Weems
Dir adv svces, Donton Cruise
Agency: Ogilvy & Mather, L.A.
Exec vp, mng dir, Gerry McGee
Vp-mgmt supr, Freddie Bee
Sr vp-media dir, Ron Reilly
Vp-assoc media dir, Tom Coughlin

142. DISNEY WORLD THEME PARK

Walt Disney World Co.

	Media investments 1986	Media investments 1985
Magazines	—	—
Ntl. Sun. mags.	—	—
Network tv	$ 2,944,700	$ 856,200
Spot tv	15,241,200	12,727,200
Network radio	—	—
Spot radio	12,121	—
Outdoor	—	400
Network cable	3,300	—
Newspapers	3,078,252	1,770,411
Total	**$21,279,573**	**15,354,211**

Marketing/brand management:
Vp-mktg, Tom Elrod
Dir mktg, Phil Lengyel
Dir pub, Charlie Ridgeway
Mgr adv, Mike McPhillips
Mgr prom, Tom Kennington
Mgr special mkts, Sandi Litrenta
Mgr creat srvcs, Deb Muenchow
Parent: Walt Disney Co.
Agency: Young & Rubicam, NY
Sr vp-dir client srvcs, Monty Roberts
Acct exec, Jane Gittleman
Vp-media grp supr, Don Davis
Media suprs: Belinda Benincasa, Mary Walsh
Black Agency: Mingo-Jones, N.Y.

143. NISSAN SENTRA

Nissan Motors Co. Ltd.

	Media investments 1986	Media investments 1985
Magazines	$ 4,194,900	$ 1,298,000
Natl. Sun. mags.	—	—
Network tv	11,154,200	5,312,200
Spot tv	4,826,500	6,567,500
Network radio	—	—
Spot radio	—	—
Outdoor	278,000	100
Network cable	108,400	94,400
Newspapers*	482,686	187,478
Total	**$21,044,686**	**$13,459,678**

*M&MD estimates

Marketing/brand management:
Vp sls & mktg, C.P. King
Dir gen mgr adv & sls prom, Joe Opre
Natl car adv mgr, Terry Fautz
Media plng mgr, Susan Furedi
Agency: William Esty, N.Y.
Sr vp-acct dir, Dick Macedo (L.A.)
Sr vp-acct svces, Don Trepte (L.A.)
Sr vp-media dir, Stacey Lippman
Sr vp-grp media dir, Lucielle Gionet
Assoc media dirs: Doug Powers (N.Y.), Jolene Fedrick (L.A.)

Ford Taurus topped the auto list as the biggest spender among individual car brands.

144. TOYOTA CARS & TRUCKS

(multi-product ads)

Toyota Motor Corp

	Media investments 1986	Media investments 1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 387,500	458,000
Spot tv	20,511,600	$23,332,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	281,000
Network cable	72,300	255,000
Newspapers*	—	1,778,000
Total	**$20,971,400**	**$26,104,000**

*M&MD estimates

Marketing/brand management:
Corp mktg mgr, George Borst
Adv strategy & media mgr, Jan Olson
Brand mgrs: Dave Danzer (cars), Don Cecconi (trucks)
Agency: DFS Dorland Worldwide/ S. Calif (Torrance)
Exec vp mgmt dir, Joe Cronin
Sr vp mgmt supr, Warren Benjamin
Sr vp acct grp suprs: Ray Damiano, Scott Gilbert
Acct suprs: Dave Doyle, Jon Bucci, John Russell, Ian Beavis
Acct execs: Brian Hill, Steve Jett, Cathy Moylan, Jim Floyd, Steve Adams, Linda Malley, Jennifer Reynolds
Sr vp media dir/dir media opers, Richard Weigand
Sr vp media dir, Nora Lapham
Vp media dir, Katherine Galicich

145. ALKA-SELTZER ANTACID/PAIN RELIEVER

Miles Labs

	Media investments 1986	Media investments 1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$12,809,800	$15,778,000
Spot tv	2,872,900	1,693,000
Network radio	4,828,000	2,112,000
Spot Radio	—	—
Outdoor	—	—
Network cable	255,700	101,000
Newspapers	135,822	—
Total	**$20,902,222**	**$19,684,000**

Marketing/brand management:
Vp mktg (U.S.), John W. Howell
Vp-adv mgr, Mitchell Streicker
Agency: McCann-Erickson, N.Y.
Sr vp-grp mgmt dir, Peter Heinz
Vp-acct dir, Mel Philpott
Sr vp-media dir, Ira Carlin
Vp-plng mgr, Vince Tortorelli
Hispanic agency: Conill, New York
Pres & ceo, Carlos R. Rossi
Exec vp-acct srvcs dir, Charles F. Magee, Jr.
Asst vp-media dir, Ilia Leon

Four domestic airlines, with a total of $285.7 million in spending, made the top 25.

146. EVEREADY ENERGIZER BATTERIES

Eveready Battery Co.

	Media investments	
	1986	1985
Magazines	$ 97,600	$ 89,000
Natl. Sun. mags.	—	—
Network tv	18,624,800	23,798,000
Spot tv	191,400	53,000
Network radio	1,255,800	1,060,000
Spot radio	47,209	202,287
Outdoor	—	—
Network cable	538,600	252,000
Newspapers	30,753	85,000*
Total	**$20,786,162**	**$25,539,287**

*M&MD estimate

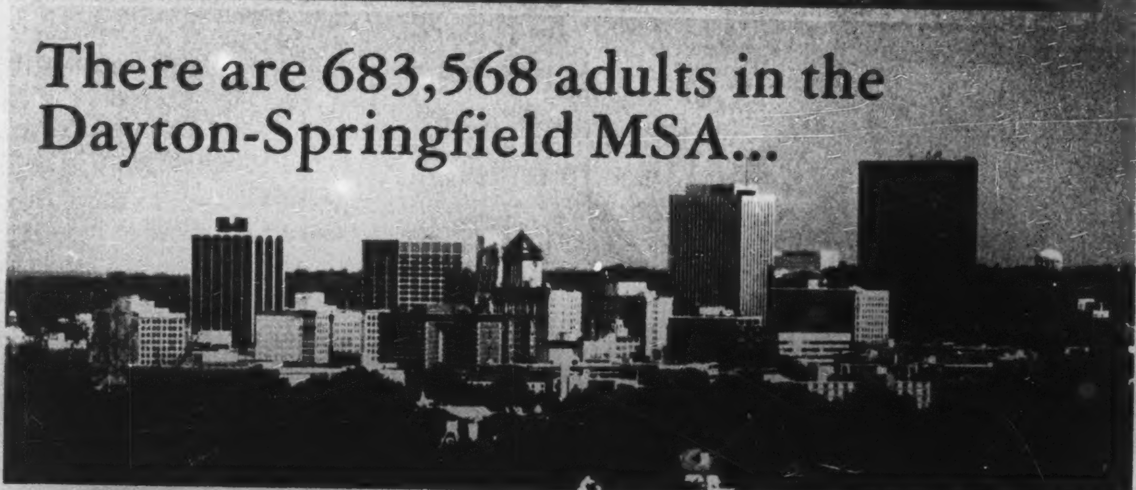
Marketing/brand management:
(Eveready & Energizer brand batteries) Vp mktg, Susan J. Obenhouse
Grp dir, John B. Snodgrass
Parent: Ralston Purina Co.
Agency: DDB Needham Worldwide, Chicago
Acct supr, Charles Austin
Acct execs: Doug Rothrock, Lisa Henson

147. HEWLETT-PACKARD CO. GENERAL PROMOTION

	Media investments	
	1986	1985
Magazines	$ 12,800	$ 2,460,600
Natl. Sun. mags.	—	—
Network tv	20,547,300	4,388,500
Spot tv	34,900	84,600
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	89,500	44,200
Newspapers	—	—
Total	**$20,684,500**	**$6,977,900**

Marketing/brand management:
Corp mktg srvcs dir, Mike Naggiar
Corp adv mgr, Dianne Armer
Agency: Leo Burnett, Chicago
Vp-acct dir, Gary Kroll
Sr vp-grp creat dir, Bob Welke

There are 683,568 adults in the Dayton-Springfield MSA...



Every week 72% of them read the
Dayton Daily News/Springfield News-Sun
THE JOURNAL HERALD

We're Ohio's best-kept secret.

For more information about Dayton-Springfield newspapers contact Leroy Smith at (513) 225-2086

Vp-media dir, Chuck Quarnstrom
Vp-acct supr, Raj Gupta

148. WALL STREET JOURNAL CIRCULATION

Dow Jones & Co.

	Media investments 1986	1985
Magazines	$ 396,900	$ 622,100
Natl. Sun. mags.	9,500	—
Network tv	5,954,300	5,054,300
Spot tv	2,814,300	2,860,300
Network radio	5,917,200	3,332,500
Spot radio	1,979,008	1,033,758
Outdoor	—	42,000
Network cable	2,350,700	2,785,700
Newspapers	1,259,215	530,160
Total	**$20,681,123**	**$16,260,818**

Marketing/brand management:
Vp mktg, Bernard Flanagan
Agency: Jim Johnston Advertising N.Y.
Sr vp grp dir, Patricia Johnston
Sr vp media, Howard Gerber

149. TOYOTA TRUCKS

Toyota Motor Corp

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$ 3,230,300	$ 1,444,000
Spot tv	12,320,600	15,602,000
Network radio	—	—
Spot radio*	2,619,463	2,255,206
Outdoor	446,100	757,000
Network cable	1,072,900	1,234,000
Newspapers*	923,265	1,423,000
Total	**$20,612,628**	**$22,715,206**

*M&MD estimates

Marketing/brand management:
Corp mktg mgr, George Borst
Adv strgy & media mgr, Jan Olson
Adv mgr trucks, Don Cecconi
Agency: DFS Dorland/S. Calif.
Exec vp mgmt dir, Joe Cronin
Sr vp grp acct supr, Scott Gilbert
Acct Supr, Jon Bucci
Acct execs: Cathy Moylan, Jim Floyd
Sr vp dir media ops, Richard Weigand
Sr vp media dir, Nora Lapham
Vp media dir, Katherine Galicich

150. POST GRAPE NUTS CEREAL

General Foods Corp.

	Media investments 1986	1985
Magazines	$ 2,824,300	$ 5,194,000
Natl. Sun. mags.	—	335,000
Network tv	12,110,800	10,110,000
Spot tv	5,021,700	5,965,000
Network radio	—	—
Spot radio	66,308	13,962
Outdoor	—	—
Network cable	543,400	501,000
Newspapers	—	378,000
Total	**$20,566,508**	**$22,496,962**

Marketing/brand management:
Vp-gm, W. H. Korab
Mktg mgr, M. C. Jacobs
Dir Development, D. J. Gustin
Cat mgr, D. B. Vermylen
Parent: Philip Morris Cos. Inc.
The media group includes:
Dir media srvcs, David K. Braun
Assoc dir media srvcs, D. J. Miceli
Agency: Grey, New York
Sr vp acct mgmt, Malcolm Mace
Exec vp media & prog srvcs, Alec Gerster
Hispanic Agency: Mendoza, Dillon & Associados, Inc.
Vp acct svcs, Fabiola Hernandez

151. DEWEY STEVENS WINE COOLER

Anheuser-Busch Cos.

	Media investments 1986	1985
Magazines	$ 557,900	—
Natl. Sun. mags.	—	—
Network tv	14,398,800	—
Spot tv	933,100	—
Network radio	1,953,600	—
Spot radio	1,376,281	—
Outdoor	5,100	—
Network cable	148,600	—
Newspapers	1,102,925	—
Total	**$20,476,306**	—

Marketing/brand management:
Vp-gm, Anheuser-Busch BeverageGroup, Terry Poulos
Dir brand mgmt, Mitch Meyers
Brand mgr, David English
Agency: DMB&B, St. Louis
Sr vp-acct grp dir, Todd Abrams
Vp-mgmt supr, Tim Rodgers
Acct supr, Terry Lucas
Sr vp-dir media srvcs, Jim Porcarelli
Assoc media dir, Debbie Bozsa
Media supr, Chris Vlahos

152. U.S. EXPRESS MAIL

U.S. Postal Service

	Media investments 1986	1985
Magazines	$ 5,192,300	$ 4,936,000
Natl. Sun. mags.	—	—
Network tv	—	4,151,000
Spot tv	14,682,000	7,989,000
Network radio	—	—
Spot radio	—	—
Outdoor	300	—
Network cable	—	284,000
Newspapers*	499,097	2,425,000
Total	**$20,373,697**	**$19,785,000**

*M&MD estimates

Marketing/brand management:
Dir mktg, Mike Spates
Dir adv, Gary Stevens
Agency: Young & Rubicam, N.Y.
Sr vp-mgmt supr, Ned Brown
Acct suprs: Dick Kebbon, Jack Powers, William McGrory, Kevin Rhodes
Vp-grp media supr, Beth Rockwood
Media supr, J. C. Ziegler

153. COCA-COLA CLASSIC

Coca-Cola USA

	Media investments 1986	1985
Magazines	$ 196,000	—
Natl. Sun. mags.	—	—
Network tv	6,626,400	$ 72,100
Spot tv	11,931,600	1,389,800
Network radio	4,500	—
Spot radio	472,450	—
Outdoor	204,900	—
Network cable	805,000	31,900
Newspapers*	95,071	39,685
Total	**$20,335,921**	**$1,533,485**

*M&MD estimates

Marketing/brand management:
Sr vp-mktg, John C. Reid
Grp mktg dir, William Schermerhorn
Brand mgr, Ina Beindorff
Assoc brand mgr, Nancy Gibson
Agency: McCann-Erickson, N.Y.
Exec vp-NY, John Dooner

Sr vp-grp mgmt dir, Ed Comiskey
Sr vp-mgmt rep, Marsha Badanes
Acct execs: Larry Glucs, Nancy Bamburger
Exec vp-worldwide media srvcs, Gordon Link
Exec vp-media dir, Ira Carlin
Vp-plng mgr, Stan Weinstein
Vp-assoc media dir, Kevin Mannion
Media grp head, Mike Delaney
Vp-worldwide coor, Ron Hatcher
Media supr, Vic Ruvolo
Media plnr, Jim Hommel
Worldwide coors: Sandra Familet, Chris Fay
Black agency: Burrell Advertising
Sr vp-gm, William Sharp
Vp-acct supr, Neva Richardson
Acct exec, Barbara Jackson
Vp-media dir, Nick Howse
Media supr, Michelle Garner
Hispanic agency: Castor Spanish International
President, Castor Fernandez
Acct exec, Bill Gonzalez

154. MILTON BRADLEY GAMES

Hasbro Inc.

(Not including separate ads for electronic games)

	Media investments 1986	1985
Magazines	$ 962,900	$ 1,417,000
Natl. Sun. mags.	33,500	61,000
Network tv	6,219,300	3,755,000
Spot tv	12,492,600	12,996,000
Network radio	—	—
Spot radio*	29,406	297,594
Outdoor	—	—
Network cable	433,600	309,000
Newspapers	31,815	63,000
Total	**$20,203,121**	**$18,898,594**

*M&MD estimates

Marketing/brand management:
Pres, George Ditomassi
Sr vp sls, E. David Wilson
Sr vp mktg, Larry Bernstein
Sr vp r&d, Michael Meyers
Vp adv & pub rel, George Merritt
Parent: Hasbro
Agency: Griffin Bacal, New York
Pres, Tom Griffin
Exec vp client srvcs, Paul Kurnit
Exec vp-dir crtv srvcs, Joe Bacal
Exec vp-dir media srvcs, Arthur Heller
Sr vp-crtv dir, Leonard Leokum
Vp-mgmt supr, Gordon Hunt

155. DODGE DEALERS ASSOCIATION FRANCHISE

Chrysler Corp.

	Media investments 1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$16,042,000	$13,677,400
Network radio	—	—
Spot radio	3,061,642	3,909,893
Outdoor	—	81,300
Network cable	—	—
Newspapers	1,096,265	1,451,234
Total	**$20,199,907**	**$19,119,827**

Marketing/brand management:
Vp mktg, Joseph A. Campana
Mgr dealer assoc adv, Ken Laurence
Gen mktg mgr, Charles B. Kitz
Agency: BBDO
Sr vp-mgmt supr, David Jones

156. FTD

Florists' Transworld Delivery Association

	Media investments 1986	1985
Magazines	$ 1,279,000	$ 1,993,000
Natl. Sun. mags.	304,500	206,000
Network tv	8,463,500	6,846,000
Spot tv	74,100	71,000
Network radio	6,384,700	5,707,000
Spot radio	—	—
Outdoor	5,700	112,000
Network cable	63,600	104,000
Newspapers	3,376,676	2,689,000
Total	**$19,951,776**	**$17,728,000**

Marketing/brand management:
Grp dir bus srvcs, Michael Michaud
Dir consumer mktg, Robert Etter
Agency: D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich.
Sr vp-mgmt supr, Harold J. Hogan

"Hey, Marge, meet the Huxleys. They're NOT from Orange County!"

One quarter of a million (244,900) Orange County residents traveled overseas last year. (Simmons-Scarborough 1985 Market Study)

THE ORANGE COUNTY
Register
METROGROUP

The leading medium in Southern California's richest market. Represented by CWO&O

Vp-grp acct supr, Mike Valant
Acct supr, Terri Anderson
Sr vp-dir media srvcs, George M. Rogers, Jr.
Vp-grp media dir, Marty Choinski

157. HONDA DEALERS ASSOCIATION FRANCHISE

American Honda Motor Co.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$19,222,900	$10,732,300
Network radio	—	—
Spot Radio	30,163	—
Outdoor	900	36,900
Network cable	—	—
Newspapers	625,846	593,641
Total	**$19,879,809**	**$11,362,841**

Marketing/brand management:
Sr vp-auto fld sales, Jack Billmyer
Sr vp-auto sales operations, Tom Elliott
Mgr-auto adv, Eric Conn
Asst mgrs-auto adv, Mike Dillon, Bill Young
Exec vp, K. Amemiya
Agencies: Various

158. CHEVROLET CAVALIER

Chevrolet Motors Division

	Media investments	
	1986	1985
Magazines	$ 3,880,600	$ 2,247,000
Natl. Sun. mags.	—	—
Network tv	11,447,800	16,082,000
Spot tv	3,451,600	5,064,000
Network radio	279,300	40,000
Spot Radio	—	—
Outdoor	34,500	25,000
Network cable	369,900	344,000
Newspapers	334,167	130,000
Total	**$19,797,867**	**$23,392,000**

Marketing/brand management:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Fld mktg mgr, Edd K. Roggenkamp
Asst gen sls mgr, M. H. Erdman
Mktg mgr passenger cars, Thomas R. Mason
Mgr passenger car adv, Danielle K. Colliver
Parent: General Motors Company
Agency: Campbell-Ewald, Detroit
Exec vp-acct dir, Robert H. Schirmer
Grp sr vp-grp mgmt suprs: Donald D. Williams (cars), Anthony J. Hopp (regional)
Vp-acct supr, Michael Ryan
Exec vp-media dir, Louis M. Schultz
Sr vp-assoc media dir, James Birchfield
Sr vp-dir natl bdcst buying, Judy Sawyer
Sr vp-dir lcl mkt media, Robert Mitchell
Vp-media suprs: Barb Munro, Jack Winkleseth

159. PEOPLE MAGAZINE CIRCULATION

Time, Inc.

	Media investments	
	1986	1985
Magazines	$ 377,000	$ 665,000
Natl. Sun. mags.	—	—
Network tv	4,222,000	2,831,000
Spot tv	13,072,200	13,979,000
Network radio	—	—
Spot radio	14,586	—
Outdoor	—	—
Network cable	913,200	468,000
Newspapers	1,114,436	1,017,000
Total	**$19,713,422**	**$18,960,000**

Marketing/brand management:
Publr, Donald Elliman
Dir mktg & prom, Jim Donahue
Dir mktg research srvcs, Barry Perrin
Agency: Holland & Callaway, N.Y.
Chmn & copywriter, Ron Holland
Pres, Jim Callaway
Prdcr, Russ Kaiser

160. NATIONAL CAR RENTAL SYSTEM, INC.

	Media investments	
	1986	1985
Magazines	$3,667,400	$1,370,400
Natl. Sun. mags.	23,000	—
Network tv	3,009,100	$3,646,400
Spot tv	8,651,600	7,181,400
Network radio	140,300	7,500
Spot radio	62,167	67,945
Outdoor	24,900	57,900
Network cable	512,200	326,100
Newspapers	3,552,251	3,040,323
Total	**$19,642,918**	**$15,697,968**

Marketing/brand management:
Vp mktg & adv, J. Sullivan
Adv mgr, John Hendrickson
Parent: Household International
Agencies: Chiat/Day, N.Y.
Vp media dir, Bob Zach
Media supr, Rob Pellizzi
Media plnr, Lisa Clayman
Damart Advertising Association
Dir sls, Judy Dodson (yellow pages)

161. JACK-IN-THE-BOX RESTAURANTS

Foodmaker Inc.

	Media investments	
	1986	1985
Magazines	—	$ 89,400
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$15,963,100	12,556,400
Network radio	—	—
Spot radio	3,625,105	4,863,609
Outdoor	33,000	589,300
Network cable	—	—
Newspapers	—	—
Total	**$19,621,205**	**18,098,709**

Marketing/brand management:
Corp vp-mktg, Mohammad Iqbal
Dir mktg, John Farrar
Dir sales mktg & prom, M. Sick
Dir prod mktg, Paul Haack
Dir mkt res, Bert Kohn
Agency: Cohen/Johnson
Vp-acct grp dir, Tom Ruffino
Acct suprs: Meade Wildrick, Vicki Rittermal

162. K MART MISCELLANEOUS BRANDS

(multi-product ads not fitting in other LNA categories)

K mart Corp.

	Media investments	
	1986	1985
Magazines	$ 5,896,400	$ 5,234,000
Natl. Sun. mags.	—	—
Network tv	4,000,100	11,231,000
Spot tv	4,075,000	4,704,000
Network radio	5,564,200	3,423,000
Spot radio	—	—
Outdoor	5,800	44,000
Network cable	16,200	101,000
Newspapers	(No data)	(No data)
Total	**$19,557,700**	**$24,737,000**

(continued)

Marketing/brand management:
Vp store plng, R. R. Dejaeghere
Sales, N. Roberts
Dir mktg, R. A. Mulligan
Dir crtv adv, B. Di Bartolomeo
Agency: Ross Roy, Detroit
Exec vp-dir retl oper, Peter C. Vetowich
Sr vp-grp mngt supr, Byron K. Shaffer
Vp-grp mngt supr, Roger Sherman
Vp-acct supr, Lawrence R. Haddock
Vp-acct supr, Lissa K. Papizan
Vp-acct supr, Jon A. Shidler
Sr vp dir mktg srvcs, Gerald N. Moody
Vp-grp media dirs: Alfred A. Duz (print), Patricia Cuda (bdcst)
Media plnr, Ellen Wright

163. HIGHLAND HOUSEHOLD PRODUCTS

Highland Superstores, Inc.

	Media investments 1986	Media investments 1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	$18,830,200	$15,988,400
Network radio	—	—
Spot radio	716,840	—
Outdoor	—	—
Network cable	—	—
Newspapers	(No data)	(No data)
Total	**$19,547,040**	**$15,988,400**

Marketing/brand management:
Dir adv & mktg, Frank Ferriolo
Asst adv dir, Marge Taylor-Wehr
Dir special events, Ed Rossman
Dir research & neg, Claudia Vala-Somand
Media dir, Marianne Barrons
Agency: W.B. Doner
Acct exec, Jeff Hale
Asst acct exec, Lynne Goswick
Mgmt supr, Ross Lerner
Print advertising: In-house

There are no imported beers in this year's ranking.

164. SUN COUNTRY WINE COOLER

Canandaigua Wine Co.

	Media investments 1986	Media investments 1985
Magazines	$ 292,300	$ 67,200
Natl. Sun. mags.	—	—
Network tv	$12,670,500	$5,120,300
Spot tv	2,618,500	1,103,800
Network radio	300,900	684,300
Spot radio	—	107,783
Outdoor	—	—
Network cable	3,628,700	534,700
Newspapers	15,156	18,925
Total	**$19,526,056**	**$7,637,008**

Marketing/brand management:
Mktg dir, Howard R. Jacobson
Brand mgr, Gerry Caro
Vp natl accts, Joseph McDonald
Vp strategic plng, Robert Huntington
Agency: Towne, Silverstein, Rotter, Inc. N.Y.
Acct supr, Steven Stetzer
Acct exec, Mark Ordover
Vp media, Michael Mulieri
Media supr, Stan Paitson

165. CAMPBELL'S CANNED SOUPS

Campbell Soup Co.

	Media investments 1986	Media investments 1985
Magazines	$ 2,594,000	$ 2,009,000
Natl. Sun. mags.	—	495,000
Network tv	12,268,800	21,112,000
Spot tv	296,400	2,013,000
Network radio	3,702,900	4,655,000
Spot radio	—	—
Outdoor	45,400	—
Network cable	555,400	474,000
Newspapers*	22,757	1,537,000
Total	**$19,485,657**	**$32,295,000**

*M&MD estimates

Marketing/brand management:
Vp-grp gm, Dan Santangelo
Business dir, Don Goerke
Mktg dirs: Larry Carpenter, Betty Cronin
Sr mktg mgrs: Bob Steenrod, Dean Bair
Mktg mgr, Lisa Lynn
Dir media srvcs, George Mahrlig
Agencies: CSC Advertising, Camden, N.J. (in-house)
Managing dir, Paul Mulcahy
Backer & Spielvogel, N.Y.
Exec vp-coo, G. Robert Holmen
Sr vp-grp mgmt rep, Joseph Prior
Vp-mgmt supr, James Keller
Vp-acct dir: Kathy Moreau
Acct suprs: King Lai, Nancy Adler
Sr vp media, Jay Schoenfeld
Media dir, Ann Meschery
Acct execs: Matt Sawyer, Suzanne Brisandine
Media supr, Lisa Tronick

166. ADA GENERAL PROMOTION

American Dairy Association

	Media investments 1986	Media investments 1985
Magazines	$ 914,600	$ 161,600
Natl. Sun. mags.	654,000	—
Network tv	$15,986,100	7,842,400
Spot tv	905,200	1,050,900
Network radio	—	—
Spot radio	—	4,375
Outdoor	437,900	18,400
Network cable	365,100	411,200
Newspapers*	101,277	19,869
Total	**$19,364,177**	**$9,508,744**

*M&MD estimates

Marketing/brand management:
Sr vp-adv & mktg srvcs, United Dairy Assn., and pres, American Dairy Assn., Joseph B. Kelsch
Vp-mktg plng, Stephen A. Dohrmann
Vp-mktg srvcs, Grover B. Simpson
Dir-adv srvcs, Donna A. Arcus
Mktg mgr-manufactured prods, Amy J. Truitt
Agency: DMB&B Chicago
Sr vp-mgmt supr, Ben Bishop
Vp-acct grp suprs: Bob Meuser, Dave Urbaniak, Mike Leonhart
Acct suprs: Brad English, Andrea Dichter
Sr vp-media srvcs, Joe Zeller
Vp-assoc media dir, Willard Hemsworth

Full sources for this year's Top 200 appear on page 115.

167. FORD THUNDERBIRD CAR

Ford Motor Co.

	Media investments 1986	Media investments 1985
Magazines	$ 8,509,200	$11,256,000
Natl. Sun. mags.	—	—
Network tv	9,735,600	20,288,000
Spot tv	661,400	1,096,000
Network radio	—	—
Spot radio	—	—
Outdoor	1,900	365,000
Network cable	343,800	518,000
Newspapers	79,784	368,000
Total	$19,331,684	$33,891,000

Marketing/brand management:
Ford Division:
Vp-gm, R.L. Rewey
Gen mktg mgr, R.H. Roberts
Adv mgr, J.B. Vanderzee
Car ad mgr, R. J. Gillooly
Dealer ad mgr, H.S. Wilson
Agency: J. Walter Thompson, Detroit, MI
Exec vp-gen mgr, Peter Schweitzer
Sr vp-acct dir, Chuck Balestrino
Sr vp-creat dir, Richard Howting
Sr vp-dir mktg srvcs, Robert Gamble
Sr vp-bdcst neg, Ron Fredrick
Sr vp-media dir, Tom Healey
Vp-car & truck grp media dir, Paul Hunt
Hispanic markets agency: Hispania/JWT, N.Y.
Sr vp-gm, Alfredo Jarrin
Acct supr, Andrea Doren
Media dir, Carlos Cintron
Acct exec, Ivan Pichardo
Black agency: Burrell Advertising
Vp-mgmt supr, Donald A. Coleman
Acct exec, Esther Terrell
Vp-media dir, Nick Howse
Assoc media dir, Zeline Kelly
Media plnr, Mary Johnny

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- Marketing
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For information contact:
Karen Katz, VP/Principal

FORUM
PERSONNEL INC

342 Madison Ave., New York, N Y 10017
(212) 687-4050

168. TRIDENT SUGARLESS GUM

Warner Lambert Co.

	Media investments 1986	Media investments 1985
Magazines	$ 2,331,700	$1,039,600
Natl. Sun. mags.	—	—
Network tv	8,348,300	6,272,200
Spot tv	3,515,500	4,998,300
Network radio	4,455,300	2,825,300
Spot radio	39,312	—
Outdoor	—	—
Network cable	537,800	402,300
Newspapers	—	—
Total	$19,227,912	$15,537,700

Marketing/brand management:
Vp prod mgmt, Robert Clouston
Ctgy dir, Steven Mojo
Sr prod mgr, Robert Ehrlich
Agency: J. Walter Thompson, N.Y.
Sr vp grp dir, Jack Morrissey
Vp acct dir, Adele Finaly
Acct supr, Peter Mackey
Acct exec, Matthew Asinari
Exec vp U.S. dir media svce, Richard Kostyra
Sr vp dir media plng, John Gray
Vp media dir, Ronnie Beason
Media supr, Ann Cleveland
Media plnr, Kelly Lowman

169. OIL OF OLAY LOTION

Richardson-Vicks Inc.

	Media investments 1986	Media investments 1985
Magazines	$ 3,705,500	$ 3,128,000
Natl. Sun. mags.	—	—
Network tv	12,846,800	12,333,000
Spot tv	2,651,800	6,083,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	—	318,000
Newspapers	—	150,000
Total	$19,204,100	$22,012,000

Marketing/brand management:
Mktg dir skin care prods, Mary Jaensch
Dir media, Irwin Fleischer
Brand mgr, Gary Cooper
Parent: Procter & Gamble Co.
Agency: Wells, Rich, Greene, N.Y.
Corp media dir, Bob Geis
Vp-media grp hd, Pat Casa

170. FRANKLIN MINT PORCELAIN COLLECTION

The Franklin Mint

	Media investments 1986	Media investments 1985
Magazines	$ 9,601,700	$ 6,849,600
Natl. Sun. mags.	6,038,500	3,824,200
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	—	—
Newspapers	3,530,652	2,989,172
Total	$19,170,852	$13,662,972

Marketing/brand management:
Vp adv, Thomas Durovsik
Parent: American Protection Industries
Agency: In-house
Vp media mgmt, Alan Beer

Eleven domestic beers are in the 1986 Top 200.

171. VISA CHARGE CARD
Visa USA Inc.

	Media investments	
	1986	1985
Magazines	$ 3,646,000	$ 1,794,200
Natl. Sun. mags.	—	—
Network tv	12,390,200	10,672,000
Spot tv	2,340,900	1,468,400
Network radio	—	786,500
Spot radio	3,682	204,331
Outdoor	6,000	85,700
Network cable	534,600	217,200
Newspapers	(No data)	(No data)
Total	**$18,921,382**	**$15,228,331**

Marketing/brand management:
Vp mktg comm, Janet Soderstrom
Sr vp mktg dir, John H. Bennett
Adv mgr, David L. Roberts
Special events mgr, Christine Koveal
Agency: BBDO, N.Y.
Exec vp sr mgmt rep, Gary De Paulo
Sr vp mgmt supr, Bill Katz
Acct supr, Rich Kronengold
Exec vp media svces, Arnie Semsky
Sr vp media plng, Mike Drake
Sr vp natl tv byng, Steve Grubbs
Sr vp assoc media dir, Mike Hedge
Media supr, Ursula Granone
Media plnr, James Cammarata

172. CONTOUR AUTOMATIC ADJUSTABLE CHAIR
Craftmatic/Contour Organization Inc.

	Media investments	
	1986	1985
Magazines	$ 33,100	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	18,805,400	$12,252,600
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	38,400	—
Newspapers	—	—
Total	**$18,876,900**	**$12,252,600**

Marketing/brand management:
Vp-mktg, Richard Zakroff
Agency: EAK Advertising (in-house)
Sr vp-grp dir, Richard Zakroff
Mgmt/admstr, Edith Lever
Prod mgr, Marie Gillingham

173. AT&T TELEPHONES
AT&T Consumer Products Division

	Media investments	
	1986	1985
Magazines	$ 1,762,100	$ 2,652,000
Natl. Sun. mags.	—	415,000
Network tv	12,521,000	14,181,000
Spot tv	2,449,400	469,000
Network radio	—	621,000
Spot Radio	68,507	—
Outdoor	—	6,000
Network cable	321,700	—
Newspapers	1,722,560	4,992,000
Total	**$18,845,267**	**$23,336,000**

Marketing/brand management:
Adv dir, A. L. Blitch
District mgr, D.B. Dubbs
Staff mgrs, N. Contess, E.K. Haley
Agency: NW Ayer, New York
Sr vp-exec acct dir, R. Wooden
Sr vp-mgmt supr, L. Rubin
Goldfarb & Hoff
(co-op program)
Pres, S. Hoff

174. FORD CORPORATE
Ford Motor Co.

	Media investments	
	1986	1985
Magazines	$ 1,093,800	$ 206,000
Natl. Sun. mags.	—	—
Network tv	11,286,400	29,765,000
Spot tv	400,500	342,000
Network radio	5,728,500	1,890,000
Spot radio	9,274	605,440
Outdoor	78,500	33,000
Network cable	217,200	1,719,000
Newspapers	16,428	3,371,000
Total	**$18,830,602**	**$37,931,440**

Marketing/brand management:
Exec dir mktg staff, J. G. O'Connor
Dir adv & mktg strategy, D. T. McClure
Adv & comm mgr, F.R. Wuellner
Media supr, H.M. Meyers
Corp adv supr, H.H. Phillips
Agency: Wells, Rich, Greene, Dearborn, Mich.
Sr vp-grp dir, James B. Lawrence
Vp-mgmt supr, Victor Emmanuele (N.Y.)
Vp-acct supr, Rober Swann (NY)
Sr acct exec, Philip Alandt
Vp-media dir, Arthur Edelstein

175. ERA PLUS LAUNDRY DETERGENT
The Procter & Gamble Co.

	Media investments	
	1986	1985
Magazines	—	$ 2,448,000
Natl. Sun. mags.	—	—
Network tv	$ 9,837,600	7,399,000
Spot tv	$8,222,900	7,057,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	694,700	433,000
Newspapers	—	62,000
Total	**$18,755,200**	**$17,399,000**

Marketing/brand management:
Vp, B. L. Byrnes
Agency: Leo Burnett, Chicago
Sr acct dir, Mary Bishop
Acct dir, Tom Dickson
(continued)

Metro Harrisburg

is the nation's 82nd largest market. But the market ranks much higher in all the important indicators—retail sales, food sales, EBI and unemployment (currently at a decade low). Find out more about reaching Metro Harrisburg spenders by asking us for a copy of our new Patriot-News market book. Phone or write Robert Cobaugh, national advertising manager (717-255-8203), or any office of Newhouse Newspapers Sales.

Harrisburg Patriot-News

Represented by Newhouse Newspapers

Acct exec, Lisa Cox
Exec vp media srvcs div, Willard Hadlock
Media dir, Robert Kirkpatrick

176. COLGATE REGULAR & GEL TOOTHPASTE

[joint product ads]

Colgate-Palmolive Co.

	Media investments	
	1986	1985
Magazines	$ 1,844,100	$ 2,430,000
Natl. Sun. mags.	—	86,000
Network tv	14,401,100	20,202,000
Spot tv	1,584,700	4,993,000
Network radio	513,200	—
Spot Radio	—	—
Outdoor	—	—
Network cable	275,400	623,000
Newspapers	28,754	122,000
Total	**$18,647,254**	**$28,456,000**

Marketing/brand management:
Vp-gm, A. C. Shepard
Mktg dir, D. Meyer (oral care)
Category mgr (oral care), J. Haber
Sr prod mgr, D. Basta
Corp dir media, Roger Godbeer
Mgr media plns, Steve Freilich
Agency: Young & Rubicam, N.Y.
Vp-grp supr, Sue Chamberlin
Media supr, E. O'Donnell

177. ANACIN 3 TABLETS

Whitehall Laboratories

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$17,639,200	$12,821,800
Spot tv	545,500	768,600
Network radio	—	—
Spot Radio	—	—
Outdoor	—	—
Network cable	462,100	141,500
Newspapers	—	—
Total	**$18,646,800**	**$13,731,900**

Marketing/brand management:
Vp mktg, Peter Mayer
Grp prod mgr, Art Lawrence
Prod mgr: Candace Coberly
Adv dir, Steven Palmisano
Asst prod mgr, Nancy Kalkin
Parent: American Home Products
Agency: Kornhauser & Calene
Sr vp-media dir, Gary Faver
Exec vp-acct dir, Alan Yarnoff
Sr vp-acct supr, Mike Detels
Acct exec, Rick Joyce

> **There are no imported beers in this year's ranking.**

178. HEAD & SHOULDERS SHAMPOO

The Procter & Gamble Co.

	Media investments	
	1986	1985
Magazines	$ 4,103,600	$ 2,629,000
Natl. Sun. mags.	—	—
Network tv	8,838,100	8,222,000
Spot tv	3,950,600	3,827,000
Network radio	—	—
Spot radio	148,195	223,084
Outdoor	—	—
Network cable	1,572,900	1,854,000
Newspapers	—	—
Total	**$18,613,395**	**$16,755,084**

Marketing/brand management:
Div mgr, W. B. Connell
Agency: Tatham-Laird & Kudner, Chicago
Sr ptner-grp acct dir, Bob Hielscher
Mgmt supr, Ilene Block
Acct exec, Kerri Shull
Grp media dir, Eileen McKnight
Media supr, Catherine McTavish

179. CHEVROLET S-10 COMPACT TRUCK

Chevrolet Motors Division

	Media investments	
	1986	1985
Magazines	$ 5,222,400	$ 2,733,700
Natl. Sun. mags.	584,300	—
Network tv	8,314,600	2,874,200
Spot tv	4,022,100	1,329,900
Network radio	3,000	—
Spot radio	—	—
Outdoor	13,200	95,100
Network cable	398,600	246,300
Newspapers	—	—
Total	**$18,558,200**	**$7,278,200**

Marketing/brand management:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Fld mktg mgr, Edd K. Roggenkamp III
Asst gen sls mgr, Michael H. Erdman
Mktg mgr-trucks, John M. Kelley
Mgr truck adv, Thomas P. Cutler

Parent: General Motors Corp.
Agency: Campbell-Ewald, Detroit
Exec vp-client srvc dir, Robert H. Schirmer
Sr vp, Dennis G. Connaughton
Grp sr vp-grp mgmt suprs: John A. Barczyk (trucks); Anthony J. Hopp (area mktg)
Exec vp-media srvcs dir, Louis M. Schultz
Sr vp-assoc media dirs: James T. Birchfield (natl); Ronald D. Geskey (area mktg)
Sr vp-mgr, Barbara A. Munro
Sr vp-dir natl brdcst media, Judith E. Sawyer
Sr vp-mgr lcl mkt media, Robert I. Mitchell II
Vp-media suprs (area mktg): Ellis J. Veech, John A. Winkelseth

180. CRAFTMATIC AUTO ADJUSTABLE BED

Craftmatic/Contour Organization Inc.

	Media investments	
	1986	1985
Magazines	$ 126,600	$ 144,900
Natl. Sun. mags.	—	21,200
Network tv	4,000	17,600
Spot tv	18,334,100	10,723,700
Network radio	36,700	—
Spot Radio	—	—
Outdoor	—	—
Network cable	31,000	59,100
Newspapers	—	—
Total	**$18,532,400**	**$10,966,500**

Marketing/brand management:
Vp-mktg, Richard Zakroff
Agency: EAK Advertising (in-house)
Sr vp-grp dir, Richard Zakroff
Mgmt/admstr, Edith Lever
Prod mgr, Marie Gillingham

181. BOUNCE FABRIC SOFTENER

Procter & Gamble Co.

	Media investments 1986	Media investments 1985
Magazines	$ 670,100	160,400
Natl. Sun. mags.	—	—
Network tv	11,301,000	10,005,300
Spot tv	5,876,900	4,736,800
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	607,000	696,300
Newspapers	—	—
Total	**$18,455,000**	**15,598,800**

Marketing/brand management:
Vp-bar soap & household clng prods, Charles C. Carroll
Agency:DMB&B, New York
Sr vp-grp dir, Ed Lebar
Vp-acct supr, Michael Dabrowski
Acct exec, Katy Persky
Sr vp-media dir, Rich Hamilton
Vp-assoc media dir, Mark McLaughlin

182. NEW YORK TELEPHONE

Nynex

	Media investments 1986	Media investments 1985
Magazines	$ 1,754,100	$ 1,527,000
Natl. Sun. Mags.	749,600	561,500
Network tv	—	—
Spot tv	7,337,200	4,547,100
Network radio	—	—
Spot radio	315,684	147,299
Outdoor	—	—
Network cable	—	—
Newspapers	8,179,500	8,041,623
Total	**$18,366,084**	**$14,824,522**

Marketing/brand management:
Vp reg plng mktg, J.N. Walsh
Asst vp adv, Emery Westfall
Div staff mgr adv, Louis Kruh
Agencies: Young & Rubicam N.Y.
Acct supr, Mary Ellen Kenny
Conill Advertising N.Y.
Pres, Rafael Connill
Exec vp, Alicia Connill

183. DENNY'S RESTAURANTS

Denny's, Inc.

	Media investments 1986	Media investments 1985
Magazines	—	$ 52,000
Natl. Sun. mags.	—	—
Network tv	9,782,600	10,508,000
Spot tv	8,380,300	12,466,000
Network radio	—	25,000
Spot Radio	—	—
Outdoor	121,800	126,000
Network cable	—	—
Newspapers	(No data)	(No data)
Total	**$18,284,700**	**$23,177,000**

Marketing/brand management:
Sr vp mktg, Barry Krantz
Vp mktg, Keith Frohreich
Dir fld mktg, Susan Henderson
Pres restaurant div, David Bixler
Pres-ceo, Vern Curtis
Agency: Foote, Cone & Belding, Los Angeles
Sr vp-grp mgmt dir, Larry Jones
Vp-mgmt dir, Fred Walti
Acct dir, Keith Kaplan
Acct exec, Alice Gold
Sr vp-media, Colleen McCloud

184. DODGE SHADOW

Chrysler Motors

	Media investments 1986	Media investments 1985
Magazines	$ 6,119,600	—
Natl. Sun. mags.	—	—
Network tv	10,144,200	—
Spot tv	1,451,200	—
Network radio	—	—
Spot radio	—	—
Outdoor	11,000	—
Network cable	280,100	—
Newspapers	191,480	—
Total	**$18,197,580**	—

Marketing/brand management:
Vp-mktg, Joseph A. Campana
Mktg mgr, Charles B. Kitz
Adv mgr, Raymond D. Dreyfus
Agency: BBDO, Southfield, Mich.
Exec vp-gm, Bill Kelly
Sr vp-grp mgmt supr, Bill Oswald
Sr vp-mgmt supr, Harry Grusche
Vp-acct suprs: Gordon Berg, Mark Caroselli, Keith Mandish
Sr vp-exec media dir, Gene McCarthy
Vp-media dir, Ted Zahrfeld

185. CHEERIOS CEREAL

General Mills, Inc.

	Media investments 1986	Media investments 1985
Magazines	$ 131,660	$ 30,000
Natl. Sun. mags.	—	—
Network tv	6,105,600	7,172,000
Spot tv	10,879,200	8,210,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	1,063,100	1,014,000
Newspapers	1,229	10,000
Total	**$18,180,789**	**$16,436,000**

Marketing/brand management:
Mktg dir, Chap Colucci
Prod mgr, Ken Powell
Adv srvcs dir, Robert J. Blake
Media srvcs dir, Hal Nitch
Media mgr, Lon W. Bencini
Agency: DFS Dorland, New York
Exec vp-mgmt dir, E. F. Bunn
Sr vp-mgmt dir, S. Sims
Vp-mgmt supr, Michael Burns
Exec vp-dir media, Allen Banks
Sr vp-sr assoc media dir, Jack Irving
Vp-assoc media dir, R. Greenberg

186. STAYFREE SILHOUETTE MAXI-PADS

Personal Products Company

	Media investments 1986	Media investments 1985
Magazines	$ 1,236,700	$ 1,969,800
Natl. Sun. mags.	—	—
Network tv	16,607,300	6,465,200
Spot tv	7,500	19,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	190,900	—
Newspapers	20,363	52,590
Total	**$18,062,763**	**$8,506,590**

Marketing/brand management:
Pres, J. B. Ziegler
Chm, M. R. Hayes
Vp info & control, R. J. Knorr
Parent: Johnson & Johnson
Agency: Saatchi & Saatchi, N.Y.
Sr vp grp dir, David Basch
Vp acct supr, Estrea Dworkin
Asst acct exec, Amy Goldman
Vp assoc media dir, Marcie Kazdin
Media supr, Emily Ross

Media plnr, Lorraine Lazarus
Hispanic agency: Mendoza Dillon & Associados Inc.
Vp acct svces, Robert L. Howells

187. CASCADE DISHWASHER DETERGENT

The Procter & Gamble Co.

	Media investments 1986	1985
Magazines	$ 3,969,500	$ 3,157,300
Natl. Sun. mags.	—	—
Network tv	11,730,700	9,100,900
Spot tv	1,703,500	3,328,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	637,400	354,400
Newspapers	—	—
Total	**$18,041,100**	**$15,940,600**

Marketing/brand management:
Vp, B.L. Byrnes
Agency: Saatchi & Saatchi Compton
Exec vp-mgmt dir, Paula Forman
Mgmt supr, Mary Haderlein
Acct exec, David Olsen

188. HONDA MOTORCYCLES

American Honda Motor Co.

	Media investments 1986	1985
Magazines	$ 1,789,600	$ 2,496,700
Natl. Sun. mags.	—	—
Network tv	8,778,600	4,136,300
Spot tv	3,890,100	6,058,400
Network radio	884,100	169,600
Spot radio	270,665	3,053,834
Outdoor	27,400	22,200
Network cable	1,981,000	1,667,200
Newspapers	394,626	325,538
Total	**$18,016,091**	**$17,929,772**

Marketing/brand management:
Natl adv mgr-motorcycle div, Neil Leventhal
Asst adv mgr-motorcycle div, Wayne Toyota
Agency: Dailey & Associates, Los Angeles
Vp-mgmt supr, Dennis Kannegae
Vp-acct supr, Dean Thompson
Sr acct exec, Lynne MacQueen
Acct exec, Daniel Fujimori

189. U.S. ARMED FORCES RECRUITING

Joint Recruiting Advertising Program

	Media investments 1986	1985
Magazines	—	$ 1,000
Natl. Sun. mags.	—	—
Network tv	15,898,100	18,771,000
Spot tv	9,700	—
Network radio	—	—
Spot radio	—	—
Outdoor	3,400	25,000
Network cable	2,079,700	972,000
Newspapers	—	—
Total	**$17,990,900**	**$19,769,000**

Marketing/brand management:
Dir joint recruiting adv prog, Lynn Lucchetti
Agency: Grey, New York
Exec vp-grp dir, Robert A. Ravitz
Vp-acct supr, Garry Niebauer
Acct suprs: Leonard Susman, David Stanley
Exec vp media & prog srvcs, Alec Gerster

190. WRIGLEY'S EXTRA SUGAR FREE GUM

Wm. Wrigley Jr. Co.

	Media investments 1986	1985
Magazines	$ 1,533,300	$ 1,010,100
Natl. Sun. mags.	—	—
Network tv	11,605,200	10,952,300
Spot tv	3,761,700	3,298,500
Network radio	—	—
Spot radio	—	—
Outdoor	—	—
Network cable	1,024,900	645,900
Newspapers	—	—
Total	**$17,925,100**	**$15,906,800**

Marketing/brand management:
Exec vp mktg, Ronald O. Cox
Mktg dir, Susan Sherry
Agency: BBDO Chicago
Exec vp, Andrew Donchak
Vp acct supr, Tonise Hayden
Sr acct exec, Kathi Hudson
Sr vp media dir, Robert Garrison
Vp dir plng, Kathy Segal
Vp AMD, Deb Nevin

191. VOLKSWAGEN PASSENGER CARS

Volkswagenwerk AG

	Media investments 1986	1985
Magazines	$ 2,773,800	$ 862,300
Natl. Sun. mags.	—	—
Network tv	8,861,600	2,618,000
Spot tv	3,443,500	1,239,400
Network radio	—	—
Spot radio	—	—
Outdoor	—	131,000
Network cable	199,200	6,000
Newspapers*	2,623,894	2,463,121
Total	**$17,901,994**	**$7,319,821**

*M&MD estimates

Marketing/brand management:
VW AG.:
Vp, James R. Fuller
Mgr mktg rep, Stuart Hamilton
Dir mktg, Richard Marcy
Mgr adv, William Gelgota
Mgr merch, Harry Hartman
Agency: DDB/Needham Detroit
Acct Execs:
Group sr vp VW, John Palmer
VW regional supr, Don Ward
Sr acct exec, Jack Callahan
Vp forward planner, Ken Campbell
Natl Adv:
Sr vp media dir, Robert A. Mancini
Vp dir VW plng, Craig Yateman
Media supr VW, Katie Kiyo
Media plnr VW, Kara Mullen
Regl Adv:
Mgr regl plng VW, Betsy Chase
Media supr, TMA central reg, Beth Chaklos
TMA budget & plns admin, Patty Buccellato

192. TONKA TOYS

Tonka Corp.

	Media investments 1986	1985
Magazines	$ 26,500	—
Natl. Sun. mags.	—	—
Network tv	13,168,300	$ 9,808,000
Spot tv	3,596,100	7,199,000
Network radio	—	—
Spot radio	—	—
Outdoor	—	20,000
Network cable	1,064,800	776,000
Newspapers	15,414	15,000
Total	**$17,871,114**	**$17,818,000**

Marketing/brand management:
Vp mktg, Ray McDonald
Dir boys' toys, Mark Ludke
Agency: Jordan, Manning, Case, Taylor, & McGrath, N.Y.
Vp-mgmt supr, Rob Moorman
Acct supr, Ellen Fields
Acct execs: Lynne Keefer, Annika Paulsson
Acct assts: Paul Sorensen, Laura MacLennan
Media dir, Sylvia Rodriguez
Media supr, Sal Sannino
Assoc media dir, Joe Siano

193. CHEVROLET CELEBRITY CAR

Chevrolet Motors Division

(Not including Wagons)

	Media investments 1986	1985
Magazines	$ 3,647,000	$ 4,091,000
Natl. Sun. mags.	294,900	—
Network tv	9,241,300	11,277,000
Spot tv	3,131,700	2,503,000
Network radio	810,500	—
Spot Radio	—	—
Outdoor	10,600	102,000
Network cable	276,900	196,000
Newspapers	408,755	—
Total	**$17,821,655**	**$18,169,000**

Marketing/brand management:
Gm, Robert D. Burger
Gen sls & srvc mgr, Robert W. Starr
Gen mktg mgr, Thomas A. Staudt
Fld mktg mgr, Edd K. Roggenkamp III
Asst gen sls mgr, M. H. Erdman
Mktg mgr passenger cars, Thomas R. Mason
Mgr passenger car adv, Danielle K. Colliver
Parent: General Motors Corp.
Agency: Campbell-Ewald, Detroit
Exec vp-acct dir, Robert H. Schirmer
Grp sr vp-grp mgmt suprs: Donald D. Williams (cars), Anthony J. Hopp (regional)
Vp-acct supr, Michael Ryan
Exec vp-media dir, Louis M. Schultz
Sr vp-assoc media dir, James T. Birchfield
Sr vp-dir natl bdcst buying, Judy Sawyer
Sr vp-dir lcl mkt media, Robert Mitchell
Vp-media suprs: Barb Munro, Jack Winkleseth

194. HERSHEY'S CANDY BARS

Hershey Foods Corp.

	Media investments 1986	1985
Magazines	$ 1,068,100	$ 2,664,000
Natl. Sun. mags.	—	—
Network tv	10,948,000	11,472,000
Spot tv	5,043,000	3,169,000
Network radio	—	1,023,000
Spot radio	—	257,317
Outdoor	—	—
Network cable	691,500	225,000
Newspapers	—	32,000
Total	**$17,750,600**	**$18,842,317**

Marketing/brand management:
Mktg vp, Jay Carr
Dir mktg, Michael Holmes
Dir new bus dev, A. J. Pingitore Jr.
Mgr pub info, Carl Andrews
Agencies: DDB/Needham Worldwide, New York
Pres, Peter Falcone
Exec vp, Peter Tate
Exec vp-media dir, Page Thompson
Vp-grp plng dir, Steve Caputo
Vp-assoc plng dir, Elizabeth Lubarsky
Ogilvy & Mather, New York
Sr vp-grp dir, Michael Vaughn
Sr vp-assoc media dir, Tony Nacinovich
Vp-asst media dirs: Kristina Allen, David Leveton
Asst media dir, Lisa Gallant

195. DODGE LANCER CAR

Chrysler Corp.

	Media investments 1986	1985
Magazines	$ 7,317,400	$7,402,000
Natl. Sun. mags.	126,700	123,000
Network tv	8,499,800	12,773,000
Spot tv	1,185,800	2,289,000
Network radio	—	—
Spot radio	—	—
Outdoor	800	56,000
Network cable	378,900	1,208,000
Newspapers	235,919	159,000
Total	**$17,745,319**	**$24,010,000**

Marketing/brand management:
Vp mktg, Joseph A. Campana
Gen mktg mgr, Charles B. Kitz
Adv mgr, Raymond Dreyfus
Agency: BBDO, Detroit
Exec vp-gm, William Kelly
Sr vp-grp mgmt supr, Wm. Oswald
Sr vp-mgmt supr, Harry Grusche
Vp-acct supr, Gordon Berg, Mark Caroselli, Keith Mandish
Sr vp-exec media dir, Eugene J. McCarthy
Vp-media dir, Theodore Zahrfeld

196. AT&T INFORMATION SYSTEMS

American Telephone & Telegraph Co.

	Media investments 1986	1985
Magazines	$1,855,800	$ 14,378,000
Natl. Sun. mags.	137,100	883,000
Network tv	9,968,400	4,454,000
Spot tv	385,500	1,401,000
Network radio	3,332,900	3,007,000
Spot Radio	—	—
Outdoor	—	—
Network cable	17,200	70,000
Newspapers*	2,029,580	6,056,000
Total	**$17,726,480**	**$30,249,000**

*M&MD estimates

Sources

Consumer magazines and national Sunday magazines: Data summarized from the PIB Magazine Analysis prepared by Leading National Advertisers Inc. (LNA) of actual linage run in those publications. Expenditures are based on current one-time gross rates before discounts. Rates for national full-run insertions are based on ad size and coloration. Rates for regional and less than full-run insertions are determined by LNA editors based on circulation and rates supplied by the magazines. Covered are more than 150 consumer magazines and three national Sunday magazines, plus tear sheets of over 1,500 regional editions a year.

Network tv and network radio: Data secured by Broadcast Advertisers Reports (BAR), which monitors all network broadcasts except those of the Mutual Radio Network. Material is collected on audio tape and then translated into a sequential listing. Network tv and network radio rates are based on estimates provided by the three networks of per-minute cost for time and talent.

Spot tv: Data secured by Broadcast Advertisers Reports (BAR) from listening posts in 75 top markets that monitor 319 stations for one week each month. These weekly records are projected to estimates of monthly spot tv usage. Spot tv rates are applied from a station rate deck that is constantly updated by agency buyers. *(continued)*

Marketing/brand management:
Adv dir, C.L. Mitchell Jr.
Div mgrs: P. C. Shyposh, W.J. Higgens
Adv mgr, P.M. Neavill
Asst mgrs: K.M. Fitzgerald, J. Moulton
Agency: Ogilvy & Mather, N.Y.
(General business systems, data systems, communications systems)Sr vp-grp dir, G.K. O'Dea
Sr. vp-mgmt supr, C. Round
Vp-mgmt supr., M. Smith
Agency: FCB/Leber Katz Partners
(Network systems, technology systems, federal systems)
Sr vp-mgmt dir, J.B. Bernegger
Vp-acct dir, F. Plantilla
Acct dir, K. Miller

197. ALKA SELTZER PLUS COLD TABLETS

Miles Laboratories, Inc.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	$12,412,800	$ 9,528,400
Spot tv	2,117,300	1,065,700
Network radio	2,821,500	969,500
Spot Radio	—	296,495
Outdoor	—	—
Network cable	363,000	131,300
Newspapers	—	—
Total	**$17,714,600**	**$11,991,395**

Marketing/brand management:
Vp-mktg, J.W. Howell
Grp prod mgr, Gordon E. Compton
Dir media operations, Mitchell B. Streicker
Sr prod mgr, David E. Bachtel
Prod mgr, Barbara D. Kauffman
Agency: Wells, Rich, Greene
Exec vp, Jim Weinstein
Vp-mgmt supr, Ken Manka

198. SALEM CIGARETTES

R.J. Reynolds Tobacco Co.

	Media investments	
	1986	1985
Magazines	—	—
Natl. Sun. mags.	—	—
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	$17,649,200	$17,498,000
Network cable	—	—
Newspapers	3,050	594,000
Total	**$17,652,250**	**$18,092,000**

Marketing/brand management:
Sr vp mktg, J. T. Winebrenner
Mktg dir, D. N. Iauco
Sr brand mgr, S. R. Strawsburg
Dir mktg srvcs, G. T. Baroody
Dir media, Dan Pearson
Grp mgr media admin, R. E. Neal
Parent: RJR Nabisco
Creative agency: FCB/Leber Katz Partners
Exec vp grp mgmt dir, Robert Hirsch
Vp mgmt dir, Janice Lee
Acct dir, Robert O'Connell
Acct execs: Jose Banzon, Rob Blumstein

199. CARLTON CIGARETTES MULTI-PRODUCT ADS

American Brands Inc.

	Media investments	
	1986	1985
Magazines	$12,807,000	13,657,700
Natl. Sun. mags.	2,096,900	301,000
Network tv	—	—
Spot tv	—	—
Network radio	—	—
Spot radio	—	—
Outdoor	1,700	13,500
Network cable	—	—
Newspapers	2,692,315	624,812
Total	**$17,597,915**	**14,597,012**

Marketing/brand management:
Vp-adv, William Moore
Mktg dev mgr, Richard E. Smith
Prod mgr, Thomas Keane
Media dir, John Mellett
Agency: Laurence Charles Free & Lawson
Exec vp, Al Magnane
Acct exec, Vicki Seiden
Asst acct exec, Fran Setzer

200. LISTERINE ANTISEPTIC MOUTHWASH

Warner-Lambert Co.

	Media investments	
	1986	1985
Magazines	$ 221,900	$ 2,793,000
Natl. Sun. mags.	—	—
Network tv	13,793,800	8,647,000
Spot tv	2,623,600	4,813,000
Network radio	—	—
Spot radio	912,972	590,628
Outdoor	—	—
Network cable	—	162,000
Newspapers	—	—
Total	**$17,552,272**	**$17,005,628**

Marketing/brand management:
Vp mktg & brand mngt, Morgan Morton
Category dir, Russ Moran
Sr prod mgr, Lynne Millheiser
Asst brand mgrs: Steve D'Andrea, Reid Stinnett
Agency: J. Walter Thompson, New York
Sr Vp-grp dir, Jack Morrissey
Sr vp acct dir, Gerard Dufour
Vp-sr acct supr, Dolly Bodick
Acct supr, Peter Leinroth
Exec vp-U.S. dir media srvcs, Richard Kostyra
Sr Sr vp-dir media plng, John Gray
Vp-assoc media dir, Ronnie Beason
Media supr, Eric Snyder
Media plnr, Pam Barnett

Sources *(continued)*
Spot radio: Data generated by Radio Expenditure Reports (RER) are calculated from a sample of 2,500 stations in 200 markets. RER's sources are 15 leading radio reps handling station groups that supply quarterly computer runs of the spots aired by station, by market, and by brand of product spots aired.
Outdoor: Data are based on information submitted to Leading National Advertisers (LNA) at the request of the Institute of Outdoor Advertising by outdoor plant operators in markets of 100,000 population or over. Covered is about 80% of total national outdoor advertising expenditures.
Newspapers: Data compiled by Media Records, which measured every ad in 201 daily and Sunday newspapers. Actual linage is multiplied by the applicable one-time general open-line rate. Dollar estimates include newspaper supplements, color comic sections, rotogravure, all color ads. *Marketing & Media Decisions* has added estimates of local expenditures in newspapers by the five leading chain retailers because the extent of their operations makes their brands, in effect, "nationally" advertised as well as distributed. **Brand dollar estimates are retabulated by** *Decisions* by major brand name from the data just described. The brand data in greater detail is also available from each of the organizations that compile the data.

POINT/COUNTERPOINT/

A TAXING SITUATION

WHY TAX ADVERTISING?

To understand why this is a relevant question, you need to understand the situation in which Florida finds itself.

Florida is the fourth largest state and the fastest growing large state. Every day, 893 new residents set up house here. By the year 2000, Florida will be the third largest state.

All these new people create a tremendous need for new infrastructure and other state services. Even without improving government services, a great number of new roads, schools and sewer systems are needed to maintain Florida's attraction as a good place to live and do business. Recent studies have indicated that in the next 15 years there will be an unfunded deficit in infrastructure needs of $53 billion.

Historically, Florida's tax structure has not kept pace with growth. We are constitutionally prohibited from imposing a personal income tax. The state relies on the sales tax for two-thirds of its general revenues — a sales tax based on the sale of tangible personal property when services are the fastest growing sector of the economy.

Without the ability to impose an income tax (and not wanting to), and realizing that you can only go to the well so many times for a sales tax rate hike, the 1987 Florida Legislature decided that the only way to solve the long-term funding problems of Florida's growth was to impose a tax on services.

The tax on advertising, like the tax on most services, is a tax directly on business. While some of the tax will be passed on to the consumer, much will be borne by the business community. It is business that benefits directly from maintaining Florida as a desirable place to live. Advertisers benefit no less than any others.

The tax on advertising will not cost Florida jobs or income. Even if it is assumed that advertising expenditures will be cut by 5%, it is ridiculous to assume that eliminating the marginal and, therefore, least efficient, 5% of advertising will materially affect the overall demand for goods and services.

In fact, Florida jobs and income should increase. The state will spend 100% of the increased revenues from the tax on advertising in Florida, creating new jobs and income. Much of the current expenditure for advertising in Florida accrues to out-of-state companies, which do nothing for jobs or income in Florida.

The most important reason, however, why advertising should be taxed is the lengths to which Florida has gone to insure fairness in the tax, not only for advertising but for all taxed services. Florida taxes only that portion of the sales price equal to market coverage of the advertising in Florida. In the case of print media the proportion is based on circulation, and in the case of broadcast media it is based on population in the broadcast area. If the costs of providing the advertising (the actual printing or broadcasting) are mostly in Florida, the tax is collected by the seller. If not, the tax is self-accrued by the advertiser and remitted directly to the state.

No one likes to pay taxes and no legislator likes to raise taxes. But if a tax on services is the only way to adequately provide for Florida's future growth, and if that tax is going to be levied on lawyer services, construction services, accounting services and real estate commissions (to name only a few), why *not* tax advertising?

Tim Deratany is a Florida state senator and minority Republican floor leader.

OUR READERS TELL US . .

The ad community is learning to live in Florida despite the ad tax, say those responding to a poll from Research USA, Chicago. Base (unless otherwise specified): 102

1. Has the passage of the 5% ad tax in the state of Florida caused you to reduce any ad expenditures in the state?

Yes	**22.5%**
No	**75.5%**
No answer	**2.0%**

2. Will you try to omit national advertising in Florida?

Yes	**31.4%**
No	**60.8%**
Don't know/no answer	**7.8%**

3. Will you try to omit national advertising in Florida if it means losing other nearby states because of a blanket effect?

Yes	**20.6%**
No	**65.7%**
Don't know/no answer	**13.7%**

4. If you continue to advertise in Florida, will you cut your ad budget relative to what the tax will cost your company?

Yes	**59.8%**
No	**29.4%**
Don't know/no answer	**10.8%**

5. If you stop advertising in Florida, which will you do?

Cut you national ad budget	**8.9%**
Use the money that is saved to beef up adver-	

CONSIDER THE COSTS

Beginning July 1, Florida will impose an unprecedented 5% sales tax on all advertising within its borders. No other state taxes national advertising, and no other state has ever imposed such a broad tax on virtually all local advertising. This tax will severely hurt Florida's economy and its consumers. Rather than improve the state's economic growth through the creation of jobs and income, the tax will slow economic growth, increase unemployment and significantly reduce the personal income of consumers in Florida.

Advertising taxes burden the selling process. They confront advertisers with extremely difficult options. Advertisers can respond to the tax by (1) reducing advertising to offset the tax; (2) continuing advertising and pass the tax on to the consumer in the form of higher prices; or (3) moving advertising to a state which does not impose a tax. None of these options are without significant cost.

Reduced advertising levels lead to decreases in sales and sales tax revenue. Higher product prices hurt most those least able to afford them. Also, the migration of advertising dollars out of the state will lead to job losses across the board.

The Association of National Advertisers, the American Association of Advertising Agencies and the American Advertising Federation recently commissioned Wharton Econometrics, a nationally renowned economic forecasting group, to determine the economic impact of an advertising tax in Florida. The study found that the imposition of the tax would result in an initial loss of over 10,000 jobs, rising to 46,000 jobs in 1989.

Florida officials dispute these findings, saying that the study did not adequately take into account the impact of increased government spending resulting from the additional ad tax revenues. However, Wharton subsequently re-ran its computer analysis based on the "best case" scenario that Florida will spend all its new ad tax revenues as soon as they are received. Wharton found that even utilizing these highly optimistic and probably unrealistic assumptions, the impact of the advertising tax would result in 34,000 fewer jobs in the state by the end of 1989 than would have occurred without the imposition of an advertising tax.

Not only does the Florida advertising tax pose significant economic problems, it also raises important constitutional issues. Because it taxes the right to speak, the Florida advertising tax is a violation of the First Amendment of the United States Constitution. Advertising is simply paid-for speech, and a tax on advertising is no less than a tax on the act of speech itself. In addition, Florida has compounded this problem by placing exemptions in the tax law that allow the state to choose who will and won't be taxed.

Finally, the new ad tax is an administrative nightmare. The law is vague, uncertain and confusing. The burden it will place on Florida's tax department and advertisers will be immense.

While the new Florida sales tax on advertising initially will raise revenue for the state, the overall impact of the tax will be detrimental. Florida's political and legislative leaders should not play Russian Roulette with the economic health of the state.

Daniel L. Jaffe is a senior vice president with the Association of National Advertisers.

tising in other states	44.1%
Will not stop/NA	42.1%
Other	4.9%

6. Do you think it is important for the industry to unite to fight this issue?

Yes	95.1%
No	4.9%

If "Yes," what measures should the industry take? (Multiple answers allowed.)

Ad boycott	41.2%
Trade associations' lobbying techniques	84.5%
Cancel all corporate meetings in state	48.5%
Cancel conventions in state	52.6%
Add a question about the ad tax on the ballot for the next election	43.3
Challenge the tax in court	71.1
Other	5.2

(Base: 97)

7. Do you think the ad tax will be repealed?

Yes	55.9%
No	34.3%
Don't know/no answer	9.8

If "No," is a similar tax likely to be taken on by other states?

Yes	82.9%
No	17.1%

(Base: 35)

8. Will the Florida ad tax complicate matters for your agency?

Yes	69.6%
No	20.6%
Don't know/no answer	9.8%

SALES PROMOTION

by Russ Bowman

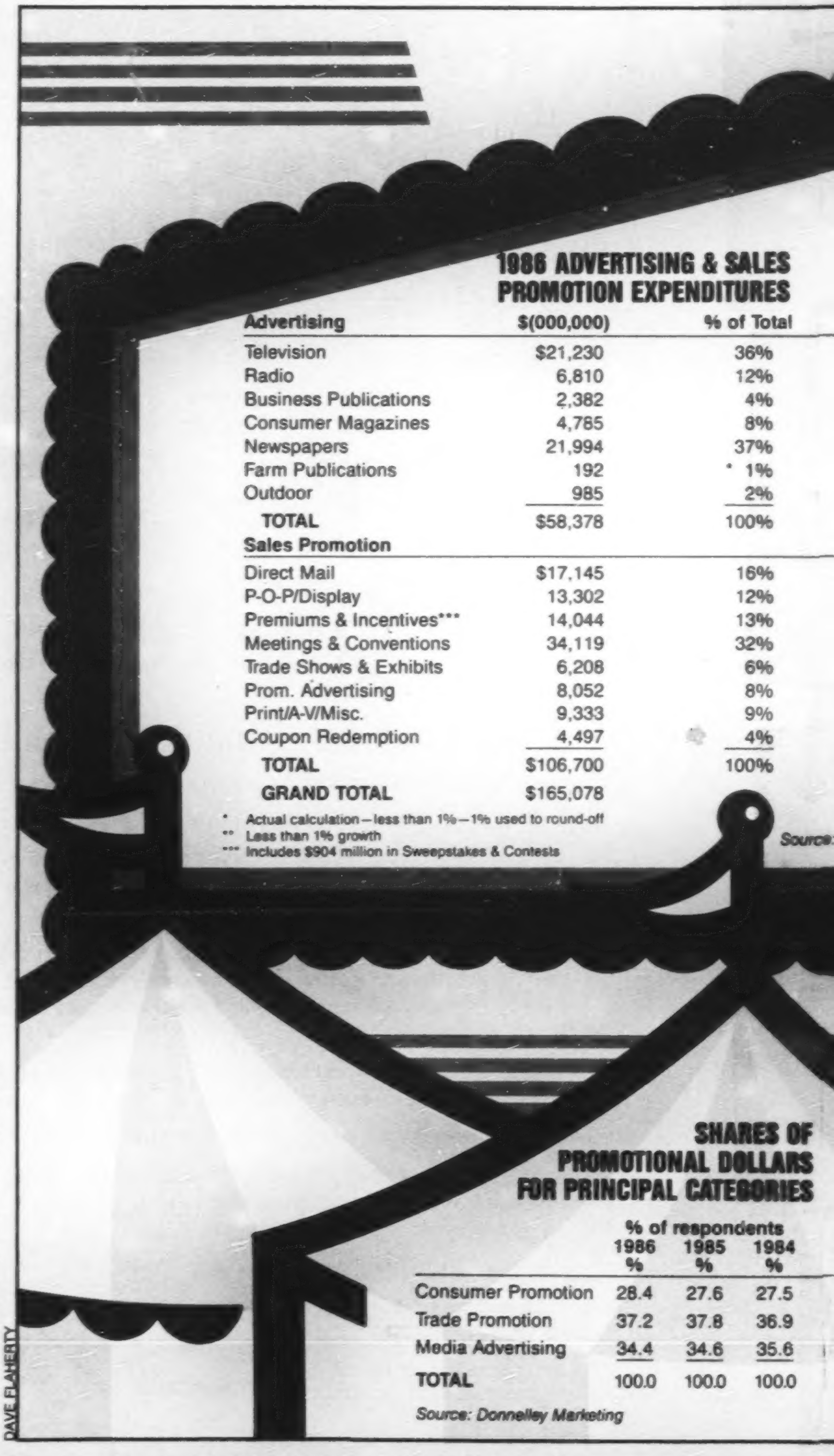
THE YEAR IN REVIEW: PART II

This year's annual report of 1986 advertising and promotion expenditures shows a similar pattern to our report one year ago, with promotion spending outpacing advertising at almost twice the growth rate, but both factors lagging behind the growth of 1984. Total advertising expenditures reached $58.4 billion, a 7% growth over 1985, while promotion spending passed the $100 billion mark at $106.7 billion, a 13% growth over 1985.

In his findings on industry spending, Robert Coen, senior vice president at McCann-Erickson/New York, compares various advertising growth rates in 1986 with the 5.2% growth in GNP in that year. With this benchmark, network tv, consumer magazines, trade publications and outdoor fell below the pace. National newspaper revenues barely showed any increase (+0.7% '86 vs. '85).

Advertising and promotion spending for food in 1987 is predicted to increase by 17%, and some companies like Quaker Oats are planning a 75% promotion/25% advertising split. RJR/Nabisco reportedly continues to pull dollars from advertising to support promotional spending.

The marketing-mix dilemma: What seems to be happening to promotion today is somewhat analogous to the classic debate in market research on the difference between attitudes or stated intentions and actual behavior. Articles in the trade press continue to quote manufacturers' plans to cut back on promotional spending and their heavy reliance on pricing to increase their brand image via larger advertising budgets. One of the problems with this sort of trade press is lack of distinction between promotional cutbacks for consumer vs. trade promotion.



DAVE FLAHERTY

1986 ADVERTISING & SALES PROMOTION EXPENDITURES

Advertising	$(000,000)	% of Total
Television	$21,230	36%
Radio	6,810	12%
Business Publications	2,382	4%
Consumer Magazines	4,785	8%
Newspapers	21,994	37%
Farm Publications	192	* 1%
Outdoor	985	2%
TOTAL	$58,378	100%
Sales Promotion		
Direct Mail	$17,145	16%
P-O-P/Display	13,302	12%
Premiums & Incentives***	14,044	13%
Meetings & Conventions	34,119	32%
Trade Shows & Exhibits	6,208	6%
Prom. Advertising	8,052	8%
Print/A-V/Misc.	9,333	9%
Coupon Redemption	4,497	4%
TOTAL	$106,700	100%
GRAND TOTAL	$165,078	

* Actual calculation—less than 1%—1% used to round-off
** Less than 1% growth
*** Includes $904 million in Sweepstakes & Contests

Source:

SHARES OF PROMOTIONAL DOLLARS FOR PRINCIPAL CATEGORIES

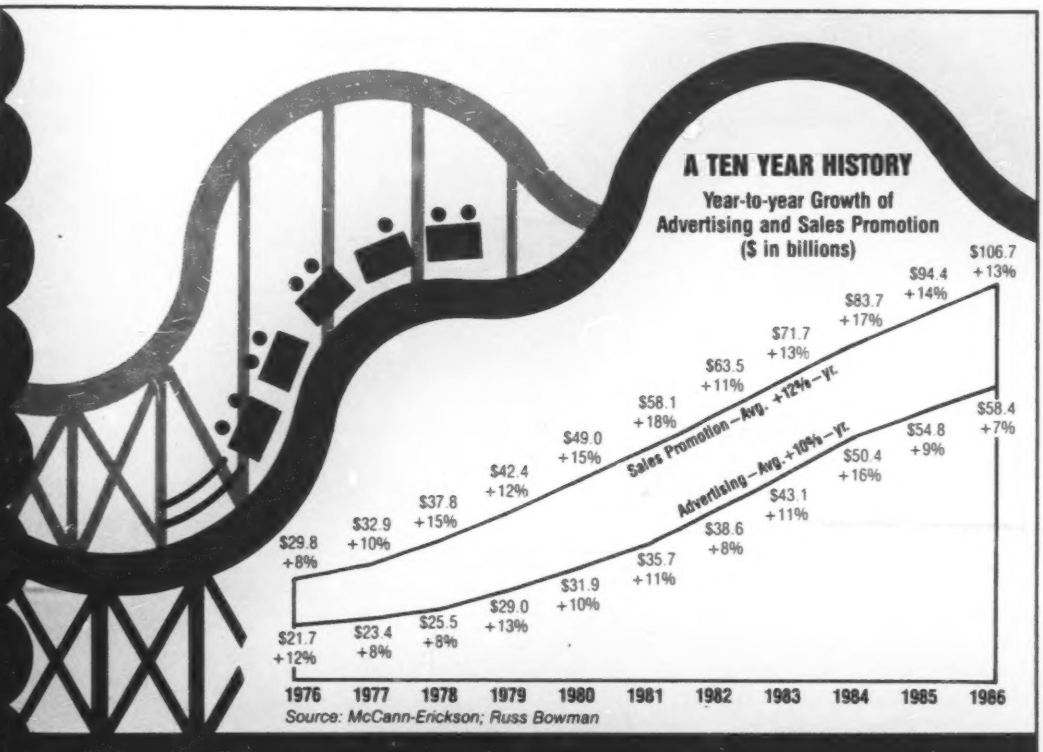
	% of respondents 1986 %	1985 %	1984 %
Consumer Promotion	28.4	27.6	27.5
Trade Promotion	37.2	37.8	36.9
Media Advertising	34.4	34.6	35.6
TOTAL	100.0	100.0	100.0

Source: Donnelley Marketing

+ % vs. 85
+ 9%
+ 7%
• •
+ 3%
+ 6%
+ 3%
+ 4%
+ 7%
+ 11%
+ 20%
+ 10%
+ 10%
+ 7%
+ 6%
+ 18%
+ 14%
+ 13%
+ 11%

cCann-Erickson

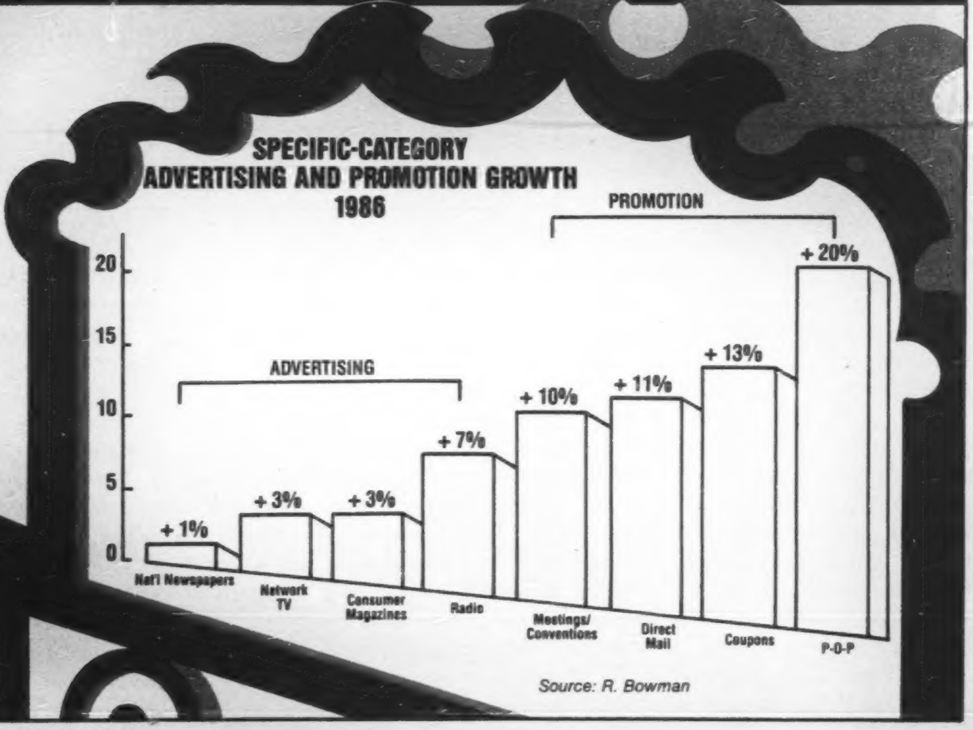
% Point Difference '86 vs. '84
+0.9
+0.3
−1.2



A TEN YEAR HISTORY

Year-to-year Growth of Advertising and Sales Promotion ($ in billions)

Source: McCann-Erickson; Russ Bowman

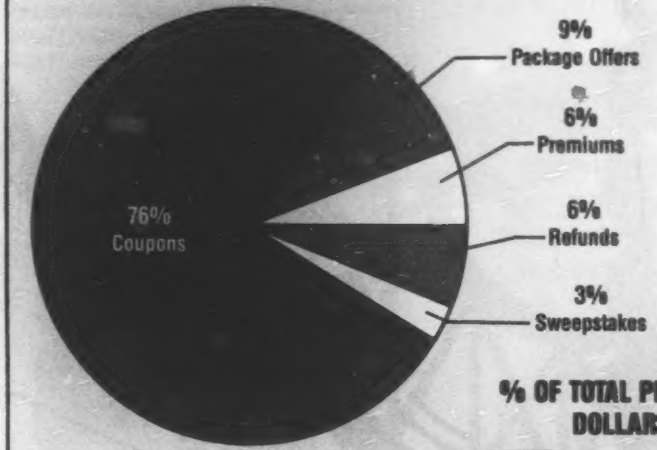


SPECIFIC-CATEGORY ADVERTISING AND PROMOTION GROWTH 1986

Source: R. Bowman

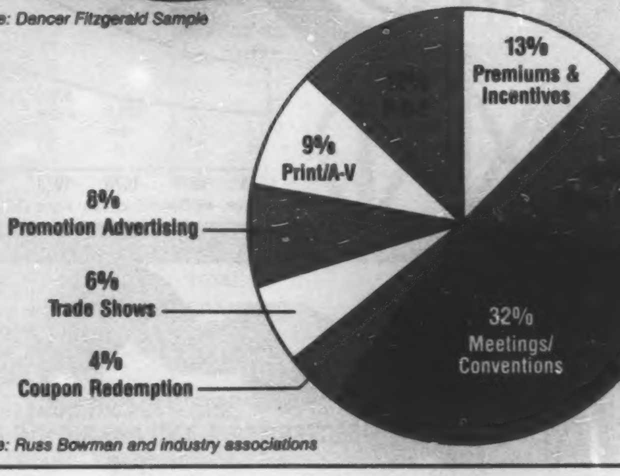
SALES PROMOTION

SHARE OF CONSUMER PROMOTION BY TYPE
BASED ON DFS STUDY OF 11,000 PROMOTIONS IN 1986



Source: Dancer Fitzgerald Sample

% OF TOTAL PROMOTION
DOLLARS BY TYPE



Source: Russ Bowman and industry associations

One survey, prepared in 1985 for ADVO Systems, indicated that manufacturers anticipated a decrease in trade promotion budgets and use of coupons, with a commensurate increase in media advertising. Couponing, according to Nielsen's Manufacturers Coupon Redemption Center (MC3), actually increased at a greater rate in 1986, and there is no indication of any significant industry-wide decline in trade promotion spending.

Donnelley's annual report on marketing expenditures, which shows advertising declining, consumer promotion gaining and trade promotion about the same, is a fair assessment of actual practice. "Share" chart on page 153 shows the results of their ninth annual study, including 1986 allocations.

In order to track the growth trends for marketing dollars, we compared the growth in 1986 for four basic advertising media with the growth over the same period for four promotional techniques. Advertising shows very meager growth: network tv and magazines up 3%; national newspaper advertising up less than 1%; and radio with the best growth of 7%. On the other hand, conventions and meetings are up an estimated 10%, direct mail is up 11%, coupons are up 14% and point-of-purchase/displays are up 20%.

Marketing/promotional expenditures not included in the comparative tables of this report include the additional product and packaging expenses involved in "bonus-packs," factory costs for inserting premiums and other offers, etc. Also not included are most trade allowance expenditures. Another category not included is telemarketing and use of 800 and 900 phone systems, estimated to be as much as $5 billion in 1986. The problem, of course, with adding brand new categories to any ongoing report is that it artificially escalates trend figures.

The shape of things to come: The future looks particularly strong for promotion through the decade.

The promotion business will probably continue to grow in the 12-15% range, while advertising will more likely show annual increases in the 7-10% range. McCann's Coen has already forecast a 7.5% growth for traditional advertising media in 1987. Joe Flannigan, current president of the Council of Sales Promotion Agencies (CSPA), sees promotion maturing and taking shape as promotion agencies become "marketing partners" with their clients. Sources in the agency segment of promotion see a 10-20% + growth over the next few years.

To keep pace with promotion's future, keep your eye on the following factors and caution signals:

1. Deregulation in industries like airlines and telephones create competitive incentive needs.
2. Regional marketing will affect promotion more than advertising.
3. Growth and influence of larger promotion agencies will result in bigger promotion budgets.
4. The importance of retail tie-ins and in-store purchasing decisions will spur more P-O-P, etc.
5. Government issues like the Florida ad tax and the possible cigarette ban may affect promotion as well.
6. If the economy lags as the year ends, price-oriented incentives, like auto rebates, may escalate.

ECONOMIC EYE

METROS AT MID-YEAR

According to *Media Industry Newsletter*, the regional marketing trend (see cover story, page 118) has not necessarily been a boon to metro/regional magazines. Ad page tallies through June 1987 show 26 of the 44 reporting titles posting declines thus far. Biggest gain: *New England*, +24.38%.

MAGAZINE AD SCORECARD	Ad Pages May 1987	% change from May 1986	Dollars spent ($00)	% change from May 1986
1. Skin Care, Creams, Lotions and Oils	152.72	−2.4%	$ 5,230.7	+18.4%
2. Lip and Eye Beauty Products	72.0	+28.2	2,634.1	+22.5
3. Scents and Fragrances	276.24	−7.6	7,731.3	−0.5
4. Facial Makeup Products	96.27	+112.4	2,877.3	+46.0
5. Prepared Dinners and Entrees (including Pizza)	34.55	+25.3	2,068.9	+26.8
6. Liquor	317.81	−12.2	13,451.5	−10.5
7. Cigarettes	629.70	−2.3	30,147.3	−6.6
8. Soaps and Detergents	39.51	−19.4	2,302.3	−31.2
9. Passenger Cars, Domestic	456.66	+6.8	21,993.4	+1.1
10. Passenger Cars, Imported	455.10	+1.6	20,991.1	−.5

Source: Publishers Information Bureau as prepared by Leading National Advertisers

MEDIA COST INDEX

1985 = 100	1986										1987					
	Aug.	% change	Sept.	% change	Oct.	% change	Nov.	% change	Dec.	% change	Jan.	% change	Feb.	% change	Mar.	% change
Network TV																
Daytime	95	−5	102	+2	103	+3	98	−2	85	−15		+0		+8		+7
Nighttime	108	+8	107	+7	104	+4	107	+7	109	+9		−9		−9		−8
Spot TV																
Prime time	121	+21	105	+5	119	+19	115	+15	116	+16		+5		−0		−0
Daytime	109	+9	99	−1	109	+9	111	+11	105	+5		+7		+11		+13
Network radio	105	+5	104	+4	115	+15	106	+6	101	+1		+14		+12		+11
Spot radio	98	−2		→	←		101	+1		→		–		+1		–
Consumer magazines	105	+5	106	+6	106	+6	106	+6	107	+7		+4		+3		+4
Natl. Sunday mags	105	+5	105	+5	94	−6	94	−6	94	−6		+11*		+11		+11
Business publications	106	+6	106	+6	106	+6	107	+7	107	+7		+5		+5		+5
Newspapers	108	+8	108	+8	108	+8	109	+9	109	+9		+8		+8		+8
Outdoor	107	+7	111	+11	106	+6	106	+6	106	+6		+6		+6		+6

Notes: Percentage shown is relative change from the same month/period the year before.

1985 = 100 *revised

Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.